# Lecturer Evaluation Workshop

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# Overview

- Intro to Interfolio API
- Types of Evaluations
- Background information on Evaluation Process
- Tips for Assembling the WPAF
- FAR Website Resources
- Interfolio Introduction
- Interfolio tips
- Interfolio Demonstration

# Interfolio Vocabulary

- **WPAF** – Stands for "working personnel action file"
  - Is a collection of documents that faculty members submit to a set of overseeing committees for evaluation
- **Case** – most recent review packet created for a faculty member, where he or she uploads their WPAF Materials
  - Also known as the **"Review Packet"**
- **Review packet section** – a specific category of documents that make up the whole of a "case"

# Interfolio API

- What?
  - This is an evaluation tool/plugin developed by IT in conjunction with FAR.
- Purpose?
  - To automatically import, as a courtesy, grade distribution and SOQ data for faculty into their active Interfolio cases
- Why?
  - To take some of the burdens of preparing evaluation portfolios off of faculty
- When?
  - The API was run very recently after cases were built
    - Don't be surprised if files were added by the University after you began working on your portfolio
- The API is a relatively new tool, which means that errors will occur
  - Responsibilities of Faculty Members undergoing review:
    - Check that all the data from all your relevant classes have been imported
      - Upload any that are missing
    - Change any document names imported by the API if you are dissatisfied with them
    - Rearrange the order of the documents imported by the API to best reflect your DSLF criteria or department culture

# Types of Evaluations

- There are several types of Evaluations that both Full-time and Part-time Lecturers can be scheduled to undergo
  - Annual Periodic (Abbreviated, Comprehensive)
  - 3-Year Periodic (AKA, Year 3 of 3 Periodic)
    - Abbreviated, Comprehensive
  - 6-Year Comprehensive
    - What type is determined by the length of your employment at CSUF and by the appointment specified in your signed contract

# Period of Review

- Each evaluation type requires different volumes of documentation depending on the length of your employment at CSUF
  - Annual periodic
    - 1st evaluation since being hired at CSUF (normally occurs in the 2nd overall semester of employment)
      - Covers **1 semester** worth of academic and professional activities, since the date of hire through the current submission deadline for the WPAF
    - All other annual periodic reviews
      - Covers **1 academic year (2 semesters)** worth of academic and professional activities since your last submission deadline through the current submission deadline for the WPAF
  - 3-Year Periodic
    - Covers **2 ½ academic years (5 semesters)** worth of academic and professional activities that have occurred since the beginning of your 3-year contract through the current submission deadline for the WPAF
  - 6-Year Comprehensive
    - Covers **5 ½ academic years (11 semesters)** worth of academic and professional activities, since the date of hire through the current submission deadline for the WPAF
- The specifics of these review periods are listed on the Lecturer Pages of the FAR website

# Summary of Review Levels

| | Evaluation Type | DPRC Reviews | Chair Reviews | Dean Reviews |
|---|---|---|---|---|
| Full-Time Lecturer | Annual Periodic | ✓ | ✓ | ✓ |
| | 3 Yr Periodic | ✓ | ✓ | ✓ |
| | 6 Yr Comprehensive | ✓ | ✓ | ✓ |
| Part-Time Lecturer | Annual Periodic | ✓ | ✓ | |
| | 3 Yr Periodic | ✓ | ✓ | ✓ |
| | 6 Yr Comprehensive | ✓ | ✓ | ✓ |

# Review Process for Lecturer Evaluations

| | |
|---|---|
| Faculty Member Submission | • Faculty member submits WPAF materials through Interfolio |
| Department Chair Declares Complete | • Chair checks to make sure that all materials have been submitted<br>• Forwards case to Departmental Review level |
| Departmental Review Step | • DPRC and Department Chair review submitted material simultaneously |
| DPRC Chair Initiates Rebuttal period | • DPRC Chair emails a copy of the DPRC's evaluation to the Faculty Member<br>• Faculty member acknowledges receipt and chooses whether or not to submit a rebuttal |
| Chair Initiates Rebuttal Period | • Chair emails copy of his or her Evaluation to the Faculty Member under review<br>• Faculty member acknowledges receipt and chooses whether or not to submit a rebuttal<br>• Case is forwarded to the Dean |
| Dean Review Step | • Dean reviews all submitted material |
| Dean Initiates Rebuttal Period | • Dean emails copy of his or her Evaluation to the Faculty Member under review<br>• Faculty member acknowledges receipt and chooses whether or not to submit a rebuttal<br>• Case is forwarded to the FAR Office |
| FAR Final Processing | • FAR audits the file for completeness<br>• Files all necessary evaluation material in PAF<br>• Closes Interfolio case |

This portion is not usually relevant to PT Lecturers undergoing an annual review

# Process for Rebuttal Period

- The Rebuttal Period will be conducted entirely through Interfolio
- You will get an email from noreply@interfolio.com
  - From this email you will be able to do the following:
    - Login to Interfolio
    - See files that were shared with you by your review committees under a new tab in your review packet called "shared committee files"
- Read the documents shared with you, in the Interfolio platform
- Use the Lecturer Rebuttal Form to indicate your decision of whether you are going to submit a rebuttal statement and/or request a meeting with the committee
  - If you do submit a rebuttal statement, include it in the appropriate area of the Lecturer Rebuttal Form
  - Upload the completed Lecturer Rebuttal form in Interfolio as your "response" to the documents shared with you
    - Tutorial: New Rebuttal Period Process
- All responses are due 10-calendar days after you receive the email from noreply@interfolio.com
  - This is a **HARD Deadline**

# Tips for Assembling the WPAF

- Start early
  - Don't wait until the week or day before everything is due to start working
  - Interfolio Server traffic is at its most congested on deadline day, which will cause the Interfolio platform to slow considerably
  - Check your **fullerton.edu** inbox regularly, for emails from FAR or ***noreply@interfolio.com***
- Find out who you should talk to about what makes a good WPAF for faculty in your department
  - This can be your Department Chair, Faculty mentor, or even a friend amongst your colleagues
- Expect to prepare a WPAF for evaluation **EVERY** year, except if you are in years 1 or 2 of a 3-year appointment ***OR*** are notified otherwise

# Tips for Assembling the WPAF Continued

- Become familiar with the Interfolio sections for Lecturer Evaluations
  - The Interfolio template is based on UPS 210.070 and contains a minimum of 12 categories
- All WPAF documents are recommended to be arranged in Reverse Chronological Order, newest on top, oldest on bottom
  - Unless specified otherwise by your department standards for lecturer faculty or departmental culture
- Table of Contents: Complete this document last
- CSUF Portal Contains access to the Faculty Student Success Dashboard (FSSD)
  - This dashboard is where you can download your SOQ/Grade Distribution Data for your evaluations
  - Tutorials – How to Log in, Accessing Graded Class lists/SOQs

# FAR Website Resources

- FAR's website: http://www.fullerton.edu/far/
- Faculty-specific webpages
  - Full-time Lecturer Faculty
  - Part-Time Lecturer Faculty
- FAR also has pages for blank SOQ forms and Departmental Standards for Lecturer Faculty (For those that have them)
  - SOQs
  - Department Standards for Lecturer Faculty (DSLF)

# Files Organizers (Optional)

- For each type of review, FAR has created a folder system that you can save on your computer or cloud storage
  - Annual Review (Comprehensive)
  - Three-Year Review (Comprehensive)
  - Six-Year Review
  - Range Elevation Review
- Download and unzip the relevant organizer
- Use the files organizer to assemble and arrange your documents prior to uploading to Interfolio
- More instructions are located within the files organizers
- Counselors and Librarians can find organizers here.

# Interfolio Introduction

- Interfolio is an electronic evaluation system utilized by many of the CSU campuses, they are also a 3rd party vendor with whom CSUF has a contract
  - ALL Lecturers are required to submit their WPAF through Interfolio.
- As CSUF faculty members, you have access to ***2*** interfolio products
  - Review, Promotion, and Tenure (we refer to this product generically as "Interfolio")
    - This is where all WPAF materials will be uploaded
    - Accessible through the CSUF Campus portal or https://account.interfolio.com/login
  - Dossier
    - This is secure storage system where you can store your materials in preparation for upcoming reviews
    - Documents stored in Dossier **ARE NOT** automatically imported into new Interfolio packets each cycle. These will need to be uploaded to review packets by faculty under review and **the packet SUBMITTED** before any review committees can see them.
- Relevant Tutorials
  - How to log in
  - How to use Dossier

# Interfolio Tips

- For Technical issues, contact the Interfolio Help Desk:
  - Email: help@interfolio.com
  - Phone: (877) 997-8807
- Tutorials Available on all FAR Lecturer Evaluation pages, in the "Interfolio Tutorials" box
- Use the most up-to-date Chrome, Firefox, or Safari browser
  - Interfolio will NOT load in Internet Explorer (IE) or Microsoft Edge
- Organize all of the documents you are planning to submit for evaluation before you upload
  - Only after you have created the system above do you create your Table of Contents
- Use a clear and logical document naming convention, so that reviewers can determine the content of each document from the name alone

# Interfolio Tips Continued

- Don't be afraid to click things while working in Interfolio
  - Any permanent changes to your packet, like submission or deletion of uploaded materials will ***ALWAYS*** require confirmation
- In sections where you have to upload more than one document, like the ones that require SOQ data, upload documents in small batches
  - This way you can re-arrange documents in smaller batches rather than one big batch
- Do ***NOT*** use the highlighting, note, or tag function in Adobe to Edit the PDFs you will be submitting, this will affect formatting and legibility
- ***Word of Caution: do not submit your portfolio without double checking the formatting of ALL your uploaded documents***

# Interfolio Demonstration

- There are three methods to log into Interfolio
  - #1 going through the Titan portal: https://my.fullerton.edu/Portal/Dashboard/
  - #2 going directly to the Interfolio Log-in Page (make sure to bookmark as a favorite): https://account.interfolio.com/login
  - #3 Clicking the "View Case" button in the body of the notification email you received from noreply@interfolio.com

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