



CALIFORNIA STATE UNIVERSITY
FULLERTON[™]

Lecturer Evaluation Workshop

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FACULTY AFFAIRS AND RECORDS

Spring 2023

Overview

- Intro to Interfolio API
- Changes to Evaluation Process due to COVID-19
- Types of Evaluations
- Background information on Evaluation Process
- Tips for Assembling the WPAF
- FAR Website Resources
- Interfolio Introduction
- Interfolio tips
- Interfolio Demonstration

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 developed very recently and is run by the IT department **ONLY** when new Interfolio cases are created for new evaluation cycles
 - It is not run at any other time in the evaluation cycle or for Range Elevation cases
- 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 DPS criteria or department culture

Lecturer Evaluation Changes due to COVID-19

- ALL Lecturer Evaluations will be submitted through Interfolio
 - This was implemented beginning in the 2020-2021 Academic Year
 - **Spring 2023 Submission Deadline: 2/21/2023**
- The Rebuttal Period portion of the Lecturer Evaluation cycle will be conducted via Interfolio
- The WPAF Checklist is now included as part of the Interfolio review packet at the bottom
 - No longer any need to provide it separately to your Chair
- Faculty members can opt out of providing Spring 2020 SOQ & Grade Distribution Data
 - See link for more details, <http://www.fullerton.edu/far/covid19/>

Types of Evaluations

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

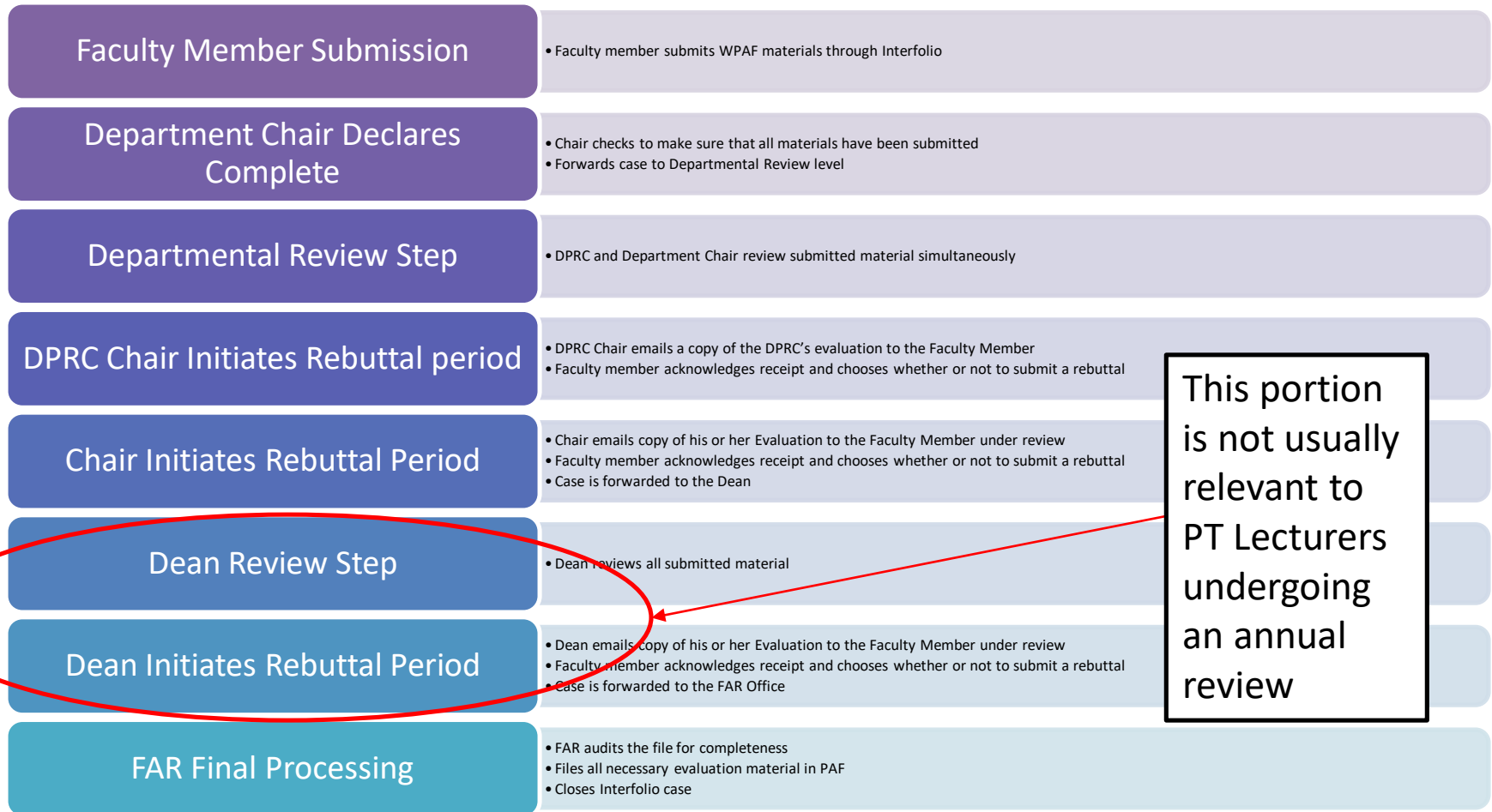
Period of Review

- 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



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

New 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, but **NOT the FAR office**
- 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 template for Lecturer Evaluations
 - [The Interfolio template is based on UPS 210.070 and contains 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/>
- Our webpages have been reorganized to have nearly identical information on them to:
 - Lessen the confusion surrounding the evaluation process
 - Keep you, the Faculty informed of upcoming events
 - Provide a clearer display of all pertinent documentation that the FAR office has to offer, to better aid you in the Evaluation process
 - [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 \(DSLFF\)](#)

Screenshots of the New Pages

Part-Time Lecturers

CALIFORNIA STATE UNIVERSITY, FULLERTON

Division of Academic Affairs
Faculty Affairs and Records

EVALUATIONS EVALUATION DOCUMENTATION TUTORIALS LEAVES EVENTS FACULTY HANDBOOK PAF REQUEST CONTACTS

FACULTY
Evaluations Home Page
Tenure-Track (Probationary)
Tenured (Promotion)
Tenured (Post Tenure Review)
Full-time Lecturers
Part-time Lecturers
Range Elevation

EVALUATION RESOURCES
Departmental Personnel Standards (DPS)
Department Standards for Lecturer Faculty (DSLFF)
SOQs
Tutorials
RTP Evaluations
PTR Evaluations
Lecturer Evaluations

REVIEWERS
RTP Evaluations
Post Tenure Reviews
Lecturer Evaluations
Part-time Lecturers

Part-Time Lecturer Evaluation Overview

Part-time Lecturer evaluations are primarily overseen by the Department and/or College, and any questions regarding evaluation should be directed to them first. The period and type of review undergone by the Faculty Member is determined by the lecturer's length of employment and contract type.

*** In the 2021-2022 Academic Year ALL Part-time Lecturers will be required to submit their WPAF through the Interfolio submission system**

Access to Interfolio is available through the CSUF faculty portal. There will be **12** categories within Interfolio for Lecturers to upload their documents,

Please note that there will also be a **Fall evaluation** cycle this year for Lecturers who only teach in Fall semesters or for whom Fall 2021 is their second semester of teaching. For **Counselors (CAPS) and Library Faculty** there are some documents that are **specific** to their portfolios and they are noted below.

UPS 210.070 defines the four types of evaluations. The period of review for each evaluation type is different and the type of evaluation that Lecturer Faculty undergo is determined by length of employment at CSUF and terms of current employment contract:

1. 6-Year comprehensive evaluation
2. Year 3 of 3 periodic evaluation

WPAF PREP TIPS

1. Expect to prepare a WPAF for evaluation **EVERY** year, unless notified otherwise. OR if you are in years 1 or 2 of a 3-year appointment.
2. First, gather and organize PDFs of all required documents
3. Use a logical naming convention for WPAF documents that helps reviewers identify contents
4. Create the WPAF Table of Contents Last
5. Contact Department Chairs, mentors, or senior faculty with Portfolio style or content questions

UPCOMING EVENTS

Click the Button below to check out all the upcoming FAR events

Upcoming Events

INTERFOLIO LOGIN

Login

Full-Time Lecturers

Faculty Affairs and Records

EVALUATIONS EVALUATION DOCUMENTATION TUTORIALS LEAVES EVENTS FACULTY HANDBOOK PAF REQUEST CONTACTS

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PTR Evaluations
Lecturer Evaluations

REVIEWERS
RTP Evaluations

Full-Time Lecturer Evaluation Overview

Faculty Affairs and Records oversees the evaluation of Full-time Lecturers. In 2021-2022, candidates and reviewers will use **Interfolio's Review, Promotion & Tenure** platform for these evaluations.

Access to Interfolio is available through the CSUF faculty portal. There will be **12** categories within Interfolio for Lecturers to upload their documents.

Faculty are required to have all of their materials uploaded by 5pm on the deadline. For **Counselors (CAPS) and Library Faculty** there are some documents that are **specific** to their portfolios and they are noted below.

UPS 210.070 defines the four types of evaluations. The period of review for each evaluation type is different and the type of evaluation that Lecturer faculty undergo is determined by length of employment at CSUF and terms of current contract:

1. 6-year comprehensive evaluation
2. Year 3 of 3 periodic evaluation
3. Annual Periodic evaluation

WPAF PREP TIPS

1. Expect to prepare a WPAF for evaluation **EVERY** year, unless notified otherwise. OR if you are in years 1 or 2 of a 3-year appointment.
2. First, gather and organize PDFs of all required documents
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UPCOMING EVENTS

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Calendar

INTERFOLIO LOGIN

Interfolio Introduction

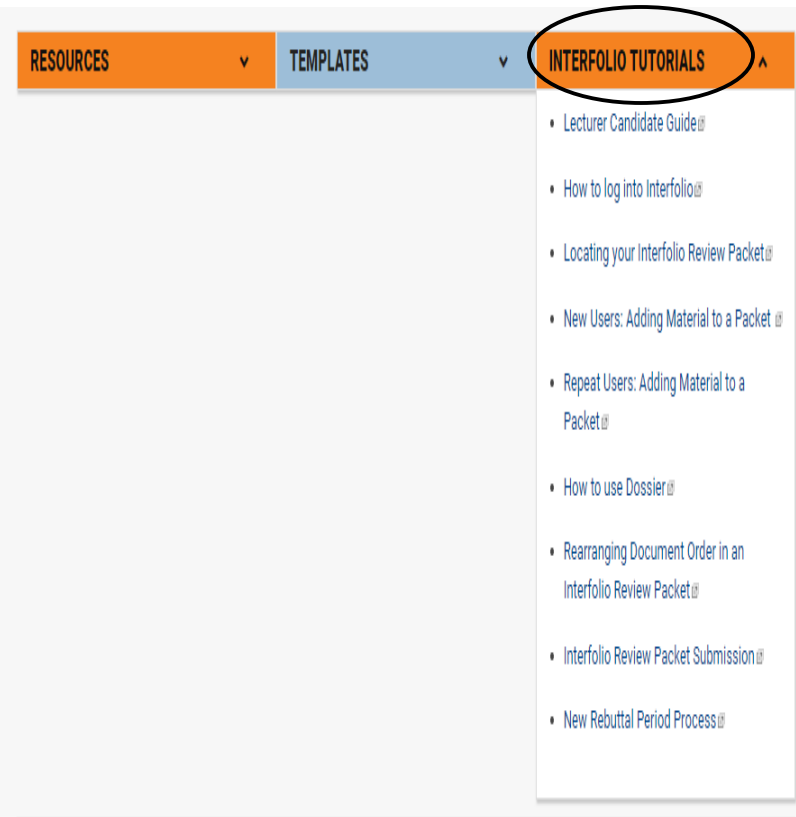
- Interfolio is an electronic evaluation system utilized by many of the CSU campuses, they are also a 3rd party vendor with whom CSUF has a contract
 - ALL Lecturers are required to submit their WPAF through Interfolio.
- As CSUF faculty members, you have access to 2 interfolio products
 - Review, Promotion, 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 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 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, under the “Interfolio Tutorials” drop down menu
- 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 in 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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