

## CSUF Master Interfolio Template for RTP Full Performance Reviews

### *Instructions to the candidate*

Welcome to Interfolio's Review, Promotion & Tenure, the evaluation system at Cal State Fullerton. Please note that the system is browser-sensitive and requires a recently-updated version of Chrome, Firefox, or Safari. Do not upload files containing any highlighting, notes, or tags as this may affect legibility.

### Submission Instructions

1. Please see [FAR's Candidate Guide](#) for details on using Interfolio. There are 26 categories below for you to upload your documents. FAR has a [Table of Contents Template](#) for you to list the contents of your RTP Portfolio.
2. All material must be uploaded and submitted by **5 pm on Friday, October 1, 2021**
3. Your [RTP Portfolio Checklist](#) needs to be emailed to your Department Chair **by 5 pm on Friday, October 1, 2021**

### Rebuttal Meeting Option Instructions:

1. Look for an email from your review committee Chairs (from the address [noreply@interfolio.com](mailto:noreply@interfolio.com)) containing a shared file.
2. Follow the instructions to view the shared file.
3. Complete the [Rebuttal/Meeting Form](#) after you receive each evaluation and/or recommendation. Upload a copy of the completed form within 10 calendar days as your "response" to the shared files ([see FAR Candidate Guide for details](#)). If you decide to submit a written response, there is space at the bottom of the form for it.

### Resources:

1. FAR Templates: [RTP Portfolio Checklist](#), [RTP Portfolio Table of Contents](#), [Rebuttal Form](#)
2. [RTP Candidate Guide](#)
3. [UPS 210.000](#)
4. [UPS 210.002](#)
5. [Departmental Personnel Standards](#)

If you have any questions, please contact the [Interfolio Help Center](#) or contact Faculty Affairs and Records at [far@fullerton.edu](mailto:far@fullerton.edu) or (657) 278-2125. Thank you.

## *Packet Requirements*

### **1.0 Table of Contents**

1 required

[Template](#) available for download on the FAR website. This document should **only** list the documents uploaded to sections **1.0-7.0**.

### **2.0 Table of Contents of Appendix**

1-3 required

Either upload another copy of each Appendix Table of Contents (from Sections 8.0, 9.0, and 10.0) or create your own Table of Contents listing the items in each section of the Portfolio Appendix.

### **3.0 Departmental Personnel Standards or UPS 210.002**

1 required

Provide your official, [approved Departmental Personnel Standards](#) or [UPS 210.002](#) if your department does not have any.

### **3.10 Prospectus**

up to 1 optional

Your plan for achieving tenure that was submitted to your Chair in your first year. Each area (teaching, scholarly and creative activities, and service) is limited to 500 words. **REQUIRED** for probationary faculty, not relevant for tenured faculty.

### **4.0 Portfolio Vita**

1 required

Vita that covers entire academic and professional employment history and lists accomplishments in all three areas of review. Peer-reviewed activities shall be listed separately from non-peer-reviewed activities. Activities should be listed in reverse chronological order.

### **5.0 Narrative Summary of Teaching Performance**

1 required

A concise (1000 words maximum) self-assessment of significant accomplishments in relation to the applicable Departmental Personnel Standards. This narrative shall clearly indicate where in the Portfolio or Appendix supporting documentation can be found.

### **5.10 List of Classes Taught**

1 required

List of all classes taught during the period of review indicating the session, course number, course title, and weighted teaching units (WTU).

### **5.20 Blank Student Opinion Questionnaire Form(s)**

1+ required

A [blank copy of the Student Opinion Questionnaire form\(s\)](#) used by the department in evaluating student responses to instruction.

### **5.30 Statistical Summaries of Student Opinion Questionnaires (Statistics Report)**

1+ required

SOQ Statistical Summary Reports are available for download from the [Faculty Student Success Dashboard \(FSSD\)](#). The SOQ Statistical Summary Report for each class taught during the period of review will need to be uploaded here. Please use a consistent file naming convention that includes the course number and term taught.

### **5.40 Statistical Summaries of Grade Distributions (Graded Class Lists)**

1+ required

Grade distributions for each class taught during the period under review for which students received University credit. Please refer to the [Faculty Student Success Dashboard \(FSSD\) tutorial](#) to download the one-page summary for each semester. Please use a consistent filename convention that includes the term of the grade distributions.

### **6.0 Narrative Summary of Scholarly and Creative Activities**

1 required

A concise (1000 words maximum) self-assessment of significant accomplishments in relation to the applicable Departmental Personnel Standards. This narrative shall clearly indicate where in the Portfolio or Appendix supporting documentation can be found.

### **7.0 Narrative Summary of Professional, University, and Community Service Activities**

1 required

A concise (1000 words maximum) self-assessment of significant accomplishments in relation to the applicable Departmental Personnel Standards. This narrative shall clearly indicate where in the Portfolio or Appendix supporting documentation can be found.

### **8.0 Table of Contents of Teaching Appendix**

1 required

Create a Table of Contents listing all of the items in your Teaching Appendix. A copy of this table of contents will also need to be uploaded to section 2.0.

### **8.10 SOQ Raw Data (Paper) or SOQ Comment Reports (Web)**

1+ required

For all SOQ surveys that were distributed in hard copy for the classes taught during your period of review, please upload all corresponding SOQ Raw Data files here. For all SOQ surveys that were administered digitally for the classes taught during your period of review, please upload all corresponding SOQ Comment reports here. Available for download from the [Faculty Student Success Dashboard \(FSSD\)](#). Please use a consistent file naming convention that includes the course number and term taught.

### **8.20 Course Materials**

1+ required

Ordinarily, representative samples are sufficient and a maximum of 10 over a five-year review period is acceptable. It is not necessary to include every syllabus or every exam or hand-out, especially for multiple sections of the same course taught over the period of review. However, it is recommended that you include your most up-to-date versions of all your course materials.

### **8.30 Other Relevant Material for Teaching Performance**

optional

Other relevant documentation for any other teaching activities referenced in the self-assessment narrative (teaching awards, special recognition, etc.)

### **9.0 Table of Contents of Scholarly and Creative Activities Appendix**

1 required

Create a Table of Contents listing all of the items in your Scholarly and Creative Activities Appendix. A copy of this table of contents will also need to be uploaded to section 2.0.

### **9.10 Publications and Creative Works**

1+ required

For published, exhibited, or performed works, a copy of each significant item in the period under review shall be included.

### **9.20 Evidence of Publications and Creative Works**

1+ required

For published, exhibited, or performed works, evidence of peer-review or lack of peer-review shall be provided for each item. Works that are not peer-reviewed shall be presented separately from those that are reviewed. Additionally, evidence of the quality of the venue shall be provided (acceptance rates, impact factor, or other measures of quality).

### **9.30 Accepted Works and Documentation**

optional

For work that has been accepted but not yet published, exhibited, or performed, a copy of each item as well as the letter of acceptance, evidence of peer-review, and evidence of quality of the publishing or performance venue shall be provided.

### **9.40 Unpublished Works and Ongoing Activities**

optional

A copy of each significant item in the period under review shall be included as well as any significant documentation that might assist reviewers in assessing quality.

### **9.50 Co-Authorship Documentation**

optional

For co-authored activities, documentation of the unique and specific contribution of each author to the work shall be included. FAR has a sample [co-author disclosure form](#) that may be used.

### **9.60 Other Relevant Material for Scholarly and Creative Activity Performance**

optional

Other relevant documentation for any other scholarship activities referenced in the self-assessment narrative (awards, grants, etc.)

## **10.0 Table of Contents of Professional, University, and Community Service Activities**

1 required

Create a Table of Contents listing all of the items in your Professional, University, and Community Service Activities Appendix. A copy of this table of contents will also need to be uploaded to section 2.0.

### **10.10 Professional, University, and Community Service Activities**

1+ required

For each significant activity, describe (and where possible document) level of participation and responsibilities.

### **10.20 Other Relevant Material for Service Activity Performance**

optional

Other relevant documentation for any other service activities referenced in the self-assessment narrative (awards, recognition, etc.)

*Internal Case Sections (visible only to Reviewers)*

## **Evaluation Documents**

**Please click the Case Details tab or the View link in the purple box above to read the specific instructions for each review step. Click the blue Read Case button to view the candidate's materials.**

This section is to be used by each review step to upload their evaluations and recommendations. Once uploaded here, the Chair and Dean are tasked with sharing the documents with the candidate.

The Chair and Dean must enable the "Response" feature when generating the email to Share the evaluations and recommendations with the candidate. The Share feature is available from the "Case Materials" screen.

The Chair and Dean must set a 10-calendar-day deadline from the date the evaluations and recommendations are shared with the candidate and set the Section for the response as **"Rebuttal/Meeting Response."** [Please see the Reviewer's guide for details.](#)

When the Chair receives a rebuttal from a candidate through Interfolio, they must alert the members of the DPC so that they can login to view the rebuttal. During the Dean stage, the Dean must share their evaluation with the Chair and DPC after sharing it with the candidate. When the Dean receives a rebuttal, they must share that with the Chair and DPC as well.

In the **2021-2022 RTP cycle**, the following deadlines apply: the DPC Evaluation, DPC Recommendation, and Chair Evaluation shall be shared **November 8, 2021**; the Chair Recommendation shall be shared by **November 19, 2021**; and the Dean Evaluation/Recommendation shall be shared by **February 4, 2022**.

## **Rebuttal/Meeting Response**

The Chair and Dean must enable the "Response" feature when generating the email to Share the evaluations and recommendations with the candidate so that they can submit the [Rebuttal/Meeting Form](#). The Share feature is available from the "Case Materials" screen.

The Chair and Dean must set a 10-calendar-day deadline from the date the evaluations and recommendations are shared with the candidate and set the Section for the response as **"Rebuttal/Meeting Response."** [Please see the Reviewer's guide for details.](#)

In the **2021-2022 RTP cycle**, the following deadlines apply: the DPC Evaluation, DPC Recommendation, and Chair Evaluation shall be shared **November 8, 2021**; the Chair Recommendation shall be shared by **November 19, 2021**; and the Dean Evaluation/Recommendation shall be shared by **February 4, 2022**.

## Previous Evaluations

Per UPS 210.000 II.B.7., Faculty Affairs and Records will upload the evaluations, recommendations, and rebuttals (if any) from all previous full performance reviews here.

*Case Review Steps with Instructions and Required Documents for each Review Level*

### Step 1

#### Department Chair Declares Complete

Due Date: Oct 11, 2021

TEST Chair (0)

*Includes Instructions*

It is critical that you confirm that each candidate has submitted all of the required documents in their RTP WPAF. Be aware of the review period for each evaluation as you confirm the material. If any material is missing, unlock the relevant section(s) and contact the candidate to request the material (please provide them with a deadline to upload it).

Once you declare the WPAF complete, fill out your portion of the RTP Portfolio Checklist that was submitted by the candidate to you by email. Upload this document to the **“Required Items” box on the “Case Details” page of each assigned case** ([see the Reviewer’s guide for details](#)). Cases cannot be forwarded until this requirement is met.

Finally, use the dark blue Send Case button in the top-right corner to forward it to the Departmental Review stage by **October 11, 2021**. Please use the "send a message" feature so that the members of the DPC will be notified that they have access.

#### *1 Required Document*

##### RTP Portfolio Checklist

Once you declare the RTP Portfolio complete, fill out your portion of the RTP Portfolio Checklist that was submitted by the candidate. When uploading, save this document to the "Evaluation Documents" section. Cases cannot be forwarded until this requirement is met.

### Step 2

#### Departmental Review

Due Date: Nov 8, 2021

TEST Chair (0)

*Includes Instructions*

The Department Chair is to evaluate the RTP WPAF according to approved [Departmental Personnel Standards](#) or [UPS 210.002](#). The Evaluation shall be prepared on the [RTP Evaluation Form](#).

Once the Chair Evaluation is complete and the DPC has completed their Evaluation and Recommendation, the parties shall exchange these documents. Please upload your Chair Evaluation to the **“Required Items” box on the “Case Details” page of each assigned**

case ([see the Reviewer's guide for details](#)) on or before **November 8** and confirm that the DPC has also uploaded their Evaluation and Recommendation. You will need to be in regular communication with the DPC to ensure that they meet the **November 8** deadline and to alert them that they can view your Chair Evaluation in Interfolio.

Once the Chair Evaluation, DPC Evaluation, and DPC Recommendation are uploaded to the **Evaluation Documents** section, the Chair shall share them with the candidate through the "Case Materials" screen and administer the 10-day rebuttal period. To do so, the Chair must enable the "Response" feature when generating the email to Share the documents with the candidate so that they can submit the required [RTP Rebuttal Form](#) to declare whether they wish to rebut and/or meet.

The Chair must set a 10-calendar-day deadline from the date the three documents (Chair Evaluation, DPC Evaluation, and DPC Recommendation) are shared with the candidate and select the section for the response as "**Rebuttal/Meeting Response.**" [Please see the Reviewer's guide for details.](#)

If the candidate submits a rebuttal to any of the three documents, the members of the DPC need to be contacted so that they can view the rebuttal(s). After the candidate submits their Rebuttal Form (or the 10 days expire), the Chair shall use the [RTP Recommendation Form](#) to write their Recommendation. Upon completion, upload the Chair Recommendation to the "**Required Items**" box on the "**Case Details**" page of each assigned case ([see the Reviewer's guide for details](#)). Email the members of the DPC to alert them that it has been posted for their viewing. Share the Chair Recommendation with the candidate through the "Case Materials" screen and administer the next 10-day rebuttal period. To do so, the Chair must enable the "Response" feature when generating the email to Share the Recommendation with the candidate so that they can submit their next RTP Rebuttal Form. If a rebuttal to the Chair Recommendation is submitted, please alert the members of the DPC so that they can view it.

In the **2021-2022** RTP cycle, the Chair Evaluation, DPC Evaluation, and DPC Recommendation shall be shared by **November 8, 2021**. The Chair Recommendation shall be shared by **November 19, 2021**. The case shall be forwarded to the Dean no later than **November 29, 2021**. Use the dark blue Send Case button in the top-right corner to forward the case (please do so as soon as the candidate submits their second Rebuttal Form). Please use the "send a message" feature so that the Dean will be notified that they have access

## *2 Required Documents*

### Chair Evaluation

Please see the Instructions screen for details on preparing the Evaluation, uploading it, sharing it with the candidate, and administering the rebuttal period.

### Chair Recommendation

Please see the Instructions screen for details on preparing the Recommendation, uploading it, sharing it with the candidate, and administering the rebuttal period.



TEST DPC (0)

*Includes Instructions*

The Department Personnel Committee is to evaluate the RTP WPAF according to approved [Departmental Personnel Standards](#) or [UPS 210.002](#). The Evaluation shall be prepared on the [RTP Evaluation Form](#). The Recommendation shall be prepared on the [RTP Recommendation Form](#).

Once the DPC has completed their Evaluation and Recommendation and the Department Chair has completed their Evaluation, the parties shall exchange these documents. The DPC Chair shall upload the DPC Evaluation and DPC Recommendation to the **“Required Items” box on the “Case Details” page of each assigned case** ([see the Reviewer’s guide for details](#)) on or before **November 8** and confirm that the Department Chair has also uploaded their Evaluation for viewing by the DPC.

**Please note that the DPC Chair is NOT responsible for sending this case to the next review level.**

*2 Required Documents*

DPC Evaluation

Please see the Instructions screen for details on preparing the Evaluation and uploading it.

DPC Recommendation

Please see the Instructions screen for details on preparing the Recommendation and uploading it.

### **Step 3**

Dean Review

Due Date: Feb 4, 2022

TEST Dean (0)

*Includes Instructions*

The Dean is to evaluate the RTP WPAF according to approved [Departmental Personnel Standards](#) or [UPS 210.002](#). The Evaluation/Recommendation shall be prepared on the [RTP Dean Evaluation Form](#).

Once you have completed your Evaluation/Recommendation, please upload it to the **“Required Items” box on the “Case Details” page of each assigned case** ([see the Reviewer’s guide for details](#)) on or before **February 4**. Next, Share the document with the candidate through the "Case Materials" screen and administer the 10-day rebuttal period. To do so, the Dean must enable the "Response" feature when generating the email to Share the document with the candidate so that they can submit the required [RTP Rebuttal Form](#) to declare whether they wish to rebut and/or meet.

The Dean must set a 10-calendar-day deadline from the date the Evaluation/Recommendation is shared with the candidate and select the section for the response as **"Rebuttal/Meeting Response."** [Please see the Reviewer’s guide for details.](#)

After sharing the document with the candidate, it must be shared with the previous reviewers (Department Chair and members of the DPC). Use the Share feature in the "Case Materials" screen to do so.

If the candidate submits a rebuttal to the Dean Evaluation/Recommendation, it must be shared with the previous reviewers (Department Chair and members of the DPC) as well. Use the Share feature in the "Case Materials" screen to do so.

After the candidate submits their Rebuttal Form (or the 10 days expire), use the dark blue Send Case button in the top-right corner to forward it to FAR (please do so ASAP if the candidate submits the form early).

#### *1 Required Document*

Dean Evaluation/Recommendation

Please see the Instructions screen for details on preparing the Evaluation/Recommendation, uploading it, sharing it with the candidate, sharing it with the previous reviewers, and administering the rebuttal period.

#### **Step 4**

FAR Confirmation

FAR (3)

No Instructions No Required Documents

#### **Step 5**

Provost Decision

Due Date: Jun 1, 2022

2020 - Provost (3)

No Instructions No Required Documents

#### **Step 6**

FAR Post Case Work

FAR (3)

No Instructions No Required Documents