General Instructions for Online Post-Tenure Review Packets

As of Fall 2013, online packets are required for post-tenure review candidates seeking a "superior" rating. This document should be used in conjunction with the *Faculty/Administration Manual* and provides information on the **construction** of these online packets, including instructions on the creation and naming of documents to be loaded into the online system. Post-tenure review candidates should turn to the *Faculty/Administration Manual*, rather than this document, for guidance on the **content** of their packet and individual documents.

In developing this online packet process for post-tenure review, our objective has been to provide convenience for reviewers (including a uniform ordering of documents) without overly burdening candidates. We welcome your feedback.

Access to online post-tenure review packets:

Online post-tenure review packets are on a SharePoint site accessible online to users on or off campus.

> **On Campus Access:** Copy and paste this address into your browser:
> `http://society.cougars.int/sites/post-tenure/`**`DEPT`**`/default.aspx` ,
> where **DEPT** is replaced with the four-letter acronym for your department.

> **Off-Campus Access to SharePoint sites**:
> Users must log into their Pulse VPN account before going to any of the College's Sharepoint sites. Prior to off-campus use, candidates and others reviewing packets must obtain a Pulse VPN account by completing the form at http://it.cofc.edu/network/documents/remote-access-request-form.pdf, securing their department chair's signature, and submitting the signed form to Helpdesk@cofc.edu. Applicants will be notified via email once their remote access is activated. Additional details about connecting remotely with VPN are available at http://vpn.cofc.edu.

General structure of on-line post-tenure review packets, including information on access[1]

This section provides a general overview of the structure of online post-tenure review packets, with more specific details, such as naming conventions, outlined in the table that follows.
- Each participating department will have a Sharepoint site, labeled by school and department (*e.g.*, "EHHP_TEDU") containing:
  - o A document library for each faculty member under review (*e.g.*, "Post-TenureGarcia"), and
  - o Any statement of additional departmental standards for post-tenure review, in cases where those exist.
- Each faculty member will load the following documents in his/her library:
  - o Letter indicating the rating for which he/she wishes to be considered,
  - o Curriculum vitae,
  - o Statement on teaching, research, and service addressing accomplishments since the last review and future plans and goals,
  - o Annual evaluations,

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[1] A table indicating how individual documents will be labeled follows later in this document.

- o Course-Instructor Evaluations (numerical summary pages from Blue reports) for all evaluated courses taught by the candidate during the period of the review,
- o Clear evidence that candidate continues to perform at the level expected for promotion to Professor or Librarian IV, in accordance with the criteria of the *Faculty/Administration Manual*, to be compiled for the intervening period between promotion evaluation and/or post-tenure reviews. As with tenure and promotion reviews, for publications and equivalent creative activities, this should include evidence of peer-review and quality,
- o List of any materials submitted in hard copy, and
- o Any additional materials, contained in their supplementary folder.
- Once those items are loaded, candidate access, including view access, will be turned off. At this point, typically just the Department Chair or, in certain cases, a departmental panel, will have access to the candidate's document library, as will higher level reviewers.
- Each faculty member's library will also contain the following:
  - o Two or more letters from intra- and/or extra-departmental peers concerning aspects of the candidate's teaching (or, for librarians, professional competency). At least two of these letters must be based, in part, on peer review of candidate's course materials and/or peer observation of candidate's classroom performance by two senior faculty colleagues. As these letters would not normally be provided to the candidate, they will be entered into the candidate's document library by the Chair, after candidate access has been turned off.
  - o Chair's letter (or departmental panel letter, in cases where the chair is undergoing post-tenure review), and
  - o Dean's recommendation, once written.
- All documents will be in PDF format. Some will be created by scanning existing paper documents; the final document submitted must be of good quality.
- Our general approach has been to ask that large single PDF documents be created, rather than many smaller PDF documents. However, in situations where a candidate is having difficulty creating a single PDF file because of limitations on the size of a document created from scanned materials, we suggest splitting the larger document into several (as described below).
- Books and other materials that cannot be submitted online may still be submitted in hard copy.
- Additional materials included that are not listed in this document should be labeled so as to follow those listed.
- Access will be assigned as follows:
  - o Academic Affairs and department chairs will have ownership access to their candidates' document libraries and will share responsibility for assigning security access.
  - o The candidate will have write/view access to their library until the deadline for the submission of packets, typically November 1. The Chair will remove candidate access when the candidate has completed his/her role in uploading documents.
  - o Other materials, including confidential materials, will be uploaded by the chair after he/she has confirmed that all candidate access is removed.
  - o When there is a departmental panel, the panel chair will serve in the role of the Department Chair, and other panel members will be given view access after the packet is complete, typically November 15.

o Academic Affairs will control write/view access for deans and higher levels of review, assigning at the departmental level (since Post-Tenure Review Committee membership may vary by department). The Dean, Post-Tenure Review Committee, and Provost will have read access throughout substantial portions of the process but will not access packets until they have formally reached those reviewers according to the calendar set out each year.

Instructions for Chair's Verification of Access to Folders

We will rely on department chairs to verify that access permissions to sites, document libraries, and folders on the SharePoint site are established as expected. To do so, please:

- Log on to the Post-Tenure Review SharePoint site: http://society.cougars.int/sites/post-tenure/**DEPT**/default.aspx, where DEPT is the 4-letter acronym for the department.
- Choose the Tab for your department. While on that announcements page, you will see a box in the upper right that says *Site Actions*. Choose the drop-down arrow. Select *Site Settings*. Toward the left you will see *Users and Permissions*. There are two options, *People and groups* and *Advanced permissions*.
- To see the permissions for the site, choose *Advanced permissions*. You will see a list of all of the individuals and groups that have access to the site as well as the level of permissions that they have.

In addition to checking access to each candidate's document library, please confirm that permissions are correct for each candidate's supplementary folder as well. Permissions at the site level may be propagated to individual folders or each can have its own permissions. To view folder permissions:
- Choose the tab for a faculty member. You should then see a screen containing their supplementary folder.
- Hover over the name of the supplementary folder and notice that a drop-down arrow appears. Click on the drop-down arrow.
- Choose *Manage Permissions*. This screen looks similar to the site permissions screen but shows the permissions for this folder only.

Given that some access is controlled by groups, you may need to revise group memberships. You can do this from your department tab by choosing *Site Actions*, then *Site Settings*, then clicking *Users and Permissions*. Alternatively, open the Groups list in the Quick Links column and click on the group that you would like to edit. Once on the group's membership page, to add users, click *New*, then *Add Users*. Once the Add User box has opened, enter users' login IDs and click the *Check Names* icon/check-mark. Select *Give Users Permission Directly* and then select the appropriate permission. Click or unclick *Send Welcome Email* (your preference), complete subject line and message if you're sending an email, and then click *OK*. To remove users, select the users to be removed, then select *Actions*, then *Remove Users from Group*. Click *OK*.

Materials should be named and loaded as follows by candidates and chairs.

Document or folder	Naming convention	Comments
Department's site	Labeled by school and department (*e.g.*, "EHHP_TEDU")	
Statement of Additional Departmental Standards for Post-Tenure Review (if any)	"*Name of Department* Standards for Post-Tenure Review"	Uploaded by Academic Affairs. Viewable by candidate, chair, and higher levels of review
Candidate's document library	Named "Post-TenureLast name" (*e.g.*, "Post-TenureGarcia")	Documents below are to be uploaded by the candidate unless otherwise specified. Access varies over time.
Letter from the candidate, indicating rating sought	"01 Last name rating sought" (*e.g.*, "01 Garcia Superior")	
Curriculum vitae	"02 Last name CV" (*e.g.*, "02 Garcia CV")	
Narrative	"03 Last name Narrative" (*e.g.*, "03 Garcia Narrative")	
Annual Evaluations	"04 Last Name Annual Evaluations"	All annual evaluations for the evaluation period should be scanned into a single PDF document in chronological order.
Course-Instructor Evaluations	"05 Last Name Course-Instructor Evaluations"	A single PDF document should contain Course-Instructor Evaluation reports (summary pages with numbers) for all sections.
Publication or creative activity 1	"06 Last Name Type of Research Activity 1" (*e.g.*, 06 Garcia Publication 1)	For each scholarly work, a single PDF document[2] will contain: a publication or creative activity, along with evidence of peer review and quality.
Publication or creative activity 2	"07 Last Name Type of Research Activity 2"	As above
Publication or creative activity 3	"08 Last Name Type of Research Activity 3"	As above
Candidate-provided teaching evidence	"09 Last Name Teaching Evidence"	A single PDF document will contain syllabus and teaching materials submitted by the candidate on all courses.

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[2] Our general approach has been to ask that large PDF documents be created, rather than many PDF documents. Xerox machines apparently limit the size of scanned documents, often to 50 or 100 pages, depending on the machine. In situations where a candidate is having difficulty creating a single PDF file because of limitations on the size of a document created from scanned materials, please create several documents labeled as xxx Part1, xxx Part 2, etc. We will not require tables of contents for documents. The College has a site license to Adobe Acrobat Pro, which can be requested via IT's website.

Document or folder	Naming convention	Comments
Service evidence	"10 Last Name Service"	Single PDF document
List of materials being submitted in hard copy *(if applicable)*	"11 Last name Hard Copy Submissions"	Books and other materials that cannot be submitted online can be submitted in hard copy and should be listed here.
Supplementary Folder *(in Candidate's folder)*	" Supplementary" *(in Candidate's folder)*	Supplementary folder contains any additional materials, numbered and labeled appropriately
Candidate access to their document library has been turned off at this point		
Letters from intra- and/or extra-departmental peers addressing teaching (or, for librarians, professional competency)	"13 Last Name Teaching Letters"	All such reviews will be scanned into a single PDF document. Uploaded by chair after candidate access is turned off.
Chair's Letter	"14 Last Name Chair's Letter"	Uploaded by chair. In cases where there is a departmental panel, the chair of that panel will have access and will load this letter.
Chair's Checklist	"15 Last Name Packet Checklist"	Uploaded by chair after verifying inclusion of all documents and confirming that all folder permissions are correct. In cases where there is a departmental panel, the chair of that panel will have access and will load this letter.
Dean's Letter	"16 Last Name Dean's Letter"	Uploaded by Dean's Office

VI. Post-Tenure Review Online Packet Checklist (for online packets only)

Candidate's Name:_____

Each item on this checklist should be entered as a single PDF document unless otherwise indicated or unless document size requires splitting scanned materials into several documents. Items should be labeled and numbered as indicated below.

Departmental Site

___ Statement of additional departmental standards for post-tenure review (if any)

Candidate's Document Library

Candidate has access until November 1 to load the following documents:
___ 01 Letter from candidate, indicating rating sought
___ 02 Curriculum vitae
___ 03 Narrative (covering teaching, research, and service)
___ 04 All Annual Evaluations (for the evaluation period in chronological order)
___ 05 Numerical Summary pages of all Course-Instructor Evaluation Reports (for all sections taught during the evaluation period)
___ 06 Publication or Creative Activity 1, including evidence of peer review and quality
___ 07 Publication or Creative Activity 2, including evidence of peer review and quality
___ 08 Publication or Creative Activity 3, including evidence of peer review and quality
___ 09 Candidate-provided teaching evidence for all courses
___ 10 Service evidence
___ 11 List of materials being submitted in hard copy *(if applicable)*
___ 12 Supplementary folder

The chair (or, in the case of dean's letter, the Dean's Office) should upload the following only after candidate access, including any view access, has been removed.
___ 13 Letters from intra- and/or extra-departmental peers addressing teaching
     (or, for librarians, professional competency)
___ If there is a panel, access is provided to them after peer letters have been loaded.
___ 14 Chair's letter
___ 15 Chair's checklist
___ Access for any departmental panel should be turned off once the panel has concluded their work and written their letter.
___ 16 Dean's letter

General
___ Chair notifies Academic Affairs that the packet is formally leaving the Department for the Dean's Office.
___ All documents are in PDF format and are of good quality for viewing
___ Items are in the correct sections and labeled and ordered as requested
___ Any hard copy materials have been forwarded

_____   _____
Signature of Chair   Date