Frequently Asked Questions (FAQs) About the Portfolio

This document is intended to supplement the **Portfolio Guidelines** document for rank-eligible full-time faculty members. Please refer to the documents in the Provost's Office Personnel Decisions webpage and the University Handbook (see the section on "Academic Appointment, Promotion, and Tenure" in the Faculty Handbook) for more information.

Portfolio Timeline

Q1: When is my portfolio due?
A1: The "Calendar for Personnel Decisions" document is available in the Provost's Office Personnel Decisions webpage and is updated each summer. Please check with your college office and/or chair for the college and department deadlines. Please see Questions (Q) 22 and 23 for considerations due to the COVID-19 pandemic.

Q2: Can I add or modify documents in my portfolio after the submission deadline?
A2: Once a faculty member submits the portfolio with a signed application form, materials may not be added, removed, or modified in the portfolio by the applicant.

Portfolio Preparation and Planning

Q3: I am tenure track or clinical track faculty member preparing my portfolio for reappointment. What guidelines should I use?
A3: The version of the Portfolio Guidelines effective in Fall 2017 is required for faculty members whose promotion-eligible appointments start Fall 2017 or later, Associate Professors applying for promotion, and Clinical Track faculty members submitting portfolios for promotion or reappointment review. Early career faculty members (e.g., Assistant Professor, Clinical Assistant Professor) appointed to their current rank prior to Fall 2017 have the option to select the version of the portfolio guidelines they will use. Reappointment portfolios should be prepared using the same guidelines for promotion and/or tenure portfolios.

Q4: I'm overwhelmed! What suggestions do you have for getting started?
A4: Updating your CV can be a good starting point, as it helps you review your activities and accomplishments (see Q8). Having a plan to work of small pieces at a time can help the process feel less overwhelming (see the portfolio outline, which is found in the Portfolio Checklist and Portfolio Guidelines documents). The portfolio is an opportunity for you to showcase and reflect on your achievements and contributions. Also, CETL is a resource available to you for individual consultation and to help answer questions.

Electronic Submission of the Portfolio

Q5: How do I prepare my portfolio for electronic submission?
A5: Organize your documents in folders according to the portfolio outline, following the letter/numbers and description for each section/subsection. A single combined PDF file with embedded links and bookmarks is not required. Please see the Electronic Submission of the Portfolio Guidelines for details.

Q6: How do I submit my portfolio electronically? What about Watermark?
A6: An online site (using USI's Microsoft SharePoint or Teams) will be created for electronic submission and review of the portfolio. This will be managed by the Provost's Office for promotion and/or tenure review or by the college dean's office for reappointment review. Instructions from the appropriate

office for accessing the site and uploading your files will be available to faculty preparing their portfolio prior to the submission deadline. Watermark is planned for university-wide portfolio submission starting during the 2025-26 academic year.

Portfolio Contents

Q7: What forms do I need to include in my portfolio?
A7: The portfolio includes two types of forms: 1) an application form (include in section A.1 of the portfolio) and 2) appraisal/recommendation forms (include in section H). Please be sure that you use the correct forms for your type of review (either promotion/tenure or reappointment).
For promotion and/or tenure review, include the set of appraisal forms applicable to your review process; not all forms in this multi-page document might apply. The forms are found in the Provost's Office Personnel Decisions webpage.

Q8: Do I need to follow the Curriculum Vita (CV) template?
A8: The CV Template is intended as a guide. It can be helpful in suggesting how to categorize different types of works and activities. The sub-heading titles may be modified as appropriate, and some categories may be deleted if they do not apply. The CV generated through Watermark based on the activities you enter/upload follows the CV template and may be used for the CV in your portfolio. The CV contents can span across your academic and professional experience, including your activity prior to joining USI and your current position.

Q9: What is the period of evaluation for the portfolio? What period of activities and materials do I include?
A9: The period of evaluation for promotion review corresponds to the period in which a faculty member is on the tenure track, duration in the Clinical Assistant Professor rank, or the period since the previous promotion/tenure review. For Clinical Track reappointment review (non-promotion), use the duration since the previous reappointment review. The portfolio materials focus on the activities during this period. See Q11-Q13 for additional information on the period for teaching materials.

Q10: What is included in the narrative?
A10: The narrative section includes separate statements for each of the applicable evaluation areas and is up to 15 single-spaced pages in length. The narrative should articulate the significance and impact of the applicant's contributions and accomplishments, as well as include reflection, in the evaluation areas during the period of evaluation. The narrative also should describe the evidence included in the supporting materials (Sections E-G). An effective narrative goes beyond a summary or listing of one's activities by describing the relevance and contributions of one's work to USI, the community, and their discipline/profession. It should help reviewers understand one's growth and trajectory based on items included in the CV and evidence materials.
Also discuss how the applicant, in one's teaching, helps foster a culture of free inquiry, free expression, and intellectual diversity; introduces students to scholarly works from a variety of political or ideological frameworks; and refrains from subjecting students to political or ideological views and opinions that are not related to one's academic discipline or assigned course.
Please refer to the Portfolio Guidelines Section D. and Faculty Handbook Section C.13 for guidance.

Q11: What is the period of teaching materials included in the portfolio?
A11: Courses taught during the period of evaluation (see Q9) or the period starting Fall 2017, whichever is shorter, is included in portfolios submitted during the 2024-2025 academic year. Please refer to the Portfolio Guidelines Section E. for details.

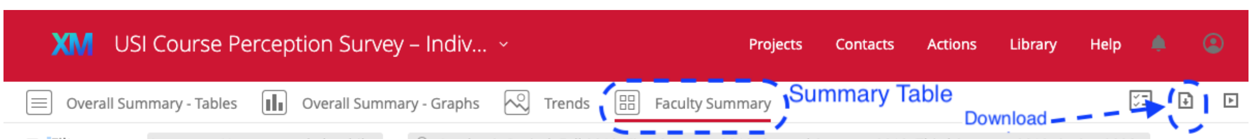
Q12: Do I include all course syllabi from all semesters in the portfolio?

A12: The most recent syllabus for each course taught during the period of teaching materials (see FAQ Q11) should be included in Section E.2 of the portfolio. Additional versions of the syllabus may be included if a course has been taught in multiple modes (such as face-to-face, online, hybrid) or to evidence topics described in the narrative (for example, the syllabus before and after a course redesign or adaptations due to the Covid-19 pandemic). Note that Section E.2 also includes evidence of teaching and learning contributions, such as course materials. Please refer to the Portfolio Guidelines Section E for additional guidance.

Q13: What course evaluation information do I include in the portfolio?

A13: Section E.3 should include summary tables of the SET and CPS scores from the period of evaluation or the period starting Fall 2017, whichever is shorter. Include separate tables for the two course surveys (SET and CPS) that list each course by semester. The SET summary table can be provided by Institutional Analytics (IAO) (formerly OPRA) with advance notice for faculty preparing portfolios. For fall portfolio submissions, this request occurs by notifying your dean by early summer of your intent to submit a portfolio.

The CPS summary table is available to view and download in the “Faculty Summary” page of the “Course Perception Survey - Individual Instructor” dashboard in Qualtrics. Additional analysis of the SET and CPS results developed by the faculty member, such as tables or graphs that focus on specific areas, may be included in Section E.3. Please refer to the Portfolio Guidelines Section E.3 for additional information.



Q14: Do I include the SETs and CPS reports in the portfolio?

A14: For faculty members who will be reviewed for reappointment, promotion and/or tenure, copies of the applicable SET and CPS reports (which include the scores and open-ended comments) do not need to be submitted with the portfolio from the period of evaluation or the period starting Fall 2017, whichever is shorter. Review committees will be given online access to the view the SET and CPS reports (excluding semesters CPS results are not required due the Covid-19 pandemic) during the appropriate review period. The provided SET and CPS reports do not count towards the 500-page limit for Part 1 of the portfolio.

If you choose to include any CPS information from semesters impacted by the Covid-19 pandemic (e.g., Spring 2020, Summer 2020, and Fall 2020), the documents may be included in Section E.3 or Part 2. Separate summary tables of SET and CPS average scores should be included in Section E.3 of the portfolio. Please see Q13 for details.

Q15: What are examples of advising activity?

A15: Student advising and mentoring materials are included in Section E5 of the portfolio. These activities typically are student-centered and occur outside of a course, such as academic advising, informal advising, mentoring, writing letters of recommendations, or accompanying students to conferences or competitions. Please refer to the Portfolio Guidelines section E.5 and the section on “Academic Appointment, Promotion, and Tenure” in the Faculty Handbook. Additionally, the impact to students of these activities should be described in the Teaching narrative.

Q16: As an Associate Professor or Clinical Associate Professor, do I include works that were published, presented, or completed during the year while my portfolio was under review for promotion and/or tenure?
A16: Evidence that was not included in the previous promotion and/or tenure review is included in the current period of evaluation and thus may be included in the portfolio. For example, a faculty member who was promoted to Associate Professor in fall 2019 would include their activities and evidence materials starting fall 2018 (since their previous portfolio was reviewed in fall 2018-spring 2019).

Q17: What are examples of professional activity?
A17: Professional activity (sometimes referred to as professional service) is part of the scholarship criterion and typically uses one's expertise and contributes to their discipline and profession; activities that contribute to one's professional growth may be included. Example activity include membership and leadership in professional organizations, conference organizing committee, or an editorial board, or serving as reviewer/juror for conference proposals, publications, creative works, or grant proposals. These activities typically are listed as professional service in the CV. Example documentation include email invitations to serve/review, webpage or programs, or other acknowledgements. Please refer to the Portfolio Guidelines section F.2 and Faculty Handbook (starting on page 42 of the PDF). Additionally, the contributions and impact to one's discipline/profession should be described in the Scholarship and Professional Activity narrative. Please refer to the Portfolio Guidelines section D.

Q18: How do I include service or outreach activities in the portfolio?
A18: Example documentation of university service and community service/outreach include email invitations, meeting minutes, reports resulting from the service, webpages, programs, or other acknowledgements. Community service should result in the promotion of the University's objectives through public service. Please refer to the Portfolio Guidelines section F.2 and the section on "Academic Appointment, Promotion, and Tenure" in the Faculty Handbook.
Additionally, the contributions and impact to the university or local/state community should be described in the Service narrative. Please refer to the Portfolio Guidelines section D.

Q19: Do I include copies of past performance evaluations, reappointment reviews, and faculty activity reports (FARs) in the portfolio?
A19: No, these documents are not part of the portfolio documents. The narrative and supporting materials sections may be used to describe and evidence progression and development based on feedback and reflection. Please refer to the Portfolio Guidelines sections D. and H. and section on "Academic Appointment, Promotion, and Tenure" in the Faculty Handbook for details and guidance.

Q20: Some sections of the portfolio do not apply to me. Do I skip them?
A20: If a section or subsection does not apply to you, please keep the order and numbering for each section as listed in the portfolio outline and insert a document that notes that the section is not applicable. For example, include a page that states "B.1. Department criteria and B.2. Special conditions do not apply" in section B.

Considerations Related to the COVID-19 Pandemic

Q21: An accepted conference presentation or creative activity was not presented due to COVID-19 cancellations. How do I represent this in my portfolio?
A21: Accepted presentations can be included in the appropriate section of the CV with a brief note to indicate that the conference, exhibit, etc. was cancelled due to COVID-19. For example, please refer to

the APA style (or appropriate citation style) for canceled conference presentations. Additionally, these research or creative activities may be described in the narrative and evidenced in the Section F. if this helps demonstrate your current/recent area of scholarship or creative activity.

Q22: Do I need to submit the form(s) that describes the one-year extension to the tenure/promotion review timeline, provided in May 2020 and May 2021?
A22: Submit the form if you have opted-out of the one-year extension(s). In general, you will want to document whether your review timeline has changed due to disruptions associated with COVID-19. If the form is not submitted by the deadline, then each one-year extension to tenure/promotion and reappointment review timeline will be automatically applied.

Q23: Can I change my mind later regarding the automatic extension or opt-out due to the pandemic?
A23: The form submitted by the deadline is the only opportunity to opt-out of the review timeline extension due to the COVID-19 pandemic.

Q24: What is a COVID Impact Statement?
A24: A COVID Impact Statement is an optional document, up to 2 pages, written by the faculty member to document the ways one's faculty work has been directly affected by COVID-19 pandemic. Recognizing that the pandemic has impacted faculty workload and professional opportunities in different ways, the statement can help provide context to reviewers by describing the effects of the pandemic on one's performance and contributions in the evaluation areas. The statement should not include any personal information or reasons for any approved leaves related to Covid. Please refer to the COVID Impact Statement Guidelines for details.

Q25: Is a COVID Impact Statement required?
A25: No, it is optional document. The presence or absence of a COVID Impact statement by itself should not be considered a positive or negative by individuals reviewing the portfolio. If you choose to provide this optional statement, include it in Section B.2.

Do you have additional questions?

We are here to help clarify the process. Please contact Amy Chan Hilton (Center for Excellence in Teaching & Learning, CETL) at amy.chanhilton@usi.edu or 812.461.5476.