CALS Template for Tab 2: P&T Portfolio Summary

Description:
This document provides the College of Agriculture and Life Sciences (CALS) template for the P&T Portfolio Summary (Tab 2). We encourage all faculty in CALS to use this template. Those with Extension appointments are required to use the template. For faculty in departments that are jointly administered with another college and who have teaching and research appointments only, please discuss the choice of templates with your chair.

The Portfolio Summary is an explanation of your accomplishments that places them in context. It interprets, analyzes and evaluates your accomplishments and provides evidence of their importance and impact. It also describes your role in collaborative activities. It is through the Portfolio Summary that you demonstrate you have met the criteria for advancement (see below). The template is designed to follow these criteria.

Please use the major headings (those in bold) from the template in your Portfolio Summary (except in cases where the heading is not relevant to your position responsibilities in which case it can be omitted). See Appendix 1 for definitions of key terms. Repetition of information contained in the CV is unnecessary. Maximum length = 25 pages. Please include pages numbers.

Criteria for Advancement: (Source: ISU Faculty Handbook, 5.2.2.2.1)

1. **Excellence in scholarship for promotion to Associate Professor (and national distinction for promotion to Professor).** Excellence in scholarship is a requirement of all faculty. "The nature of scholarly work at a diverse university necessarily varies. In the promotion and tenure review process, however, evidence that a significant portion of a faculty member's scholarship has been documented (i.e., communicated to and validated by peers beyond the university) is required of all."   Scholarship may occur in the areas of teaching, research/creative activities, and/or extension/professional practice. Some of the components of scholarship are described below

    Character of scholarship: Develops and communicates new understanding and insights. Generates, synthesizes, interprets, critically analyzes, and communicates new knowledge, methods, understandings, technologies, materials, uses, insights, beauty and so forth.
    Means of communicating scholarship: Teaching materials and methods, classes, curricula; publications, presentations, exhibits, performances, patents, copyrights, distribution of materials or programs, etc.
    Criteria for validating scholarship: Originality, significance, accuracy, replicability, scope, applicability, breadth, depth and duration of influence, persistence of influence or use, adoption by peers, impact or public benefits, etc.
    Means of Documenting Scholarship: Present evidence that creative intellectual work was validated by peers; communicated to peers and broader audiences; recognized, accepted, cited, adopted, or used by others. In other words, that it made a difference.

2. **Effectiveness in areas of responsibility:** Each faculty member is required to be effective in all areas of responsibility: teaching, research/creative activities, and/or extension/professional practice.

3. **Institutional Service**: To be promoted and/or tenured faculty members are expected to have been involved in institutional service. For promotion from Assistant to Associate Professor a candidate must demonstrate satisfactory institutional service. For promotion to Professor, a candidate must demonstrate significant institutional service. Reviewers assess service within the context of the entire portfolio.

CALS Tab 2 Template

Table of Contents

Executive Summary

1. **Performance in Scholarship (Required of all candidates)**
   This section provides an opportunity for the candidate to demonstrate excellence in scholarship. It begins with an overall statement of the candidate's accomplishments in scholarship as they relate to teaching, research/creative activities, and extension/professional practice. It must include a self-assessment of scholarly accomplishments that have been validated by peers. (Source: ISU Faculty Handbook, 5.3.2.1).

   The following topics are required in this section:
   - The context for your scholarship
   - Scholarship philosophy and goals
   - Completed and current programs and projects
   - Self-assessment of accomplishments
   - Self-assessment of refereed journal articles, books, book chapters, and other products that have been peer reviewed
   - Self-assessment of other means used to share your scholarship (such as invited presentations if applicable)
   - Self-assessment of sponsored funding
   - Self-assessment of disclosures, licenses, patents, and inventions (if applicable)
   - Honors and awards received
   - Plans for future scholarship

2. **Performance in Position Responsibilities**

   2.1. **Teaching and Learning (only include if this is an element of your PRS)**
   Your accomplishments in <u>scholarship</u> related to teaching and learning belong in *Performance in Scholarship* (above, see # 2).   The following topics are required in this section:
   - Teaching philosophy statement
   - Teaching responsibilities (including percent effort from PRS)
     o Narrative description plus a tabular list of courses taught using the following format and beginning with the most recent semester

Semester & Year	Course #	Course Title	Enrollment	Percent of course for which responsible

   - Assessment of teaching effectiveness
     o Summarize results of student evaluations of teaching - tabular form using 5 point rising scale and including comparison to departmental norms
     o Summarize procedures for and results of peer evaluation of teaching (letters from peers may be placed in Tab 3)
     o Evidence of learning gains
   - Graduate advising (may be addressed here or under Research or Extension. If the details are listed in your CV in Tab 1 then you may summarize your impact in graduate student advising here.)
     o (Describe the general departmental practice in graduate advising)

- o MS Program of Study Committees (since appointment or last promotion)
  In progress:
  - Chair/major professor (list names of students)
  - Member of committee (list names of students)
  Completed:
  - Chair/major professor (list names of students, date completed, placement)
  - Member of committee (list names of students, date completed, placement)
- o PhD Program of Study Committees (since appointment or last promotion)
  In progress:
  - Chair/major professor (list names of students)
  - Member of committee (list names of students)
  Completed:
  - Chair/major professor (list names of students, date completed, placement)
  - Member of committee (list names of students, date completed, placement

The following items should be included if applicable
- Self-assessment of sponsored funding related to teaching and learning
- Self-assessment of curriculum development and teaching materials development
- Undergraduate advising (Describe impact in quantitative and qualitative terms)
- Self-assessment of mentoring of high school, undergraduate, and graduate students/post-docs
- Teaching improvement and future teaching plans

2.2. Research and/or Creative Activities: (only include if this is an element of your PRS)
Your accomplishments in scholarship related to research belong in *Performance in Scholarship* (above, see # 2). Other accomplishments that are not part of your scholarship should be addressed here. In CALS, faculty without formal Extension appointments may be engaged in outreach. Outreach activities may be listed under *Research and Creative Activities* or under *Institutional and Professional Service*.

2.3. Extension (only include if this is an element of your PRS)
For faculty with a formal budgeted appointment in Extension. Your accomplishments in scholarship related to extension belong in *Performance in Scholarship* (above, see # 2). The following topics are addressed in this section:
- Statement of extension philosophy
- Extension responsibilities and/or extension focus areas (including percent effort from PRS)
- Summary of Extension program(s) (see definition in Appendix) using tabular and/or narrative format
- Self-assessment of program impact (individual and/or team)
  - o Summarize procedures for and results of program impact
  - o Leadership and contributions to team program and program impact
  - o Success stories that have resulted from programming efforts (If appropriate)
  - o Needs assessment efforts (if appropriate)
- Assessment of Extension presentation effectiveness
  - o Summarize results of participant evaluations of presentations - tabular form
  - o Summarize procedures for and results of peer evaluation of presentations (letters from peers may be placed in Tab 3) (if appropriate)
  - o Evidence of learning gains (if appropriate)

- Self-assessment of outputs that comprise your program(s), i.e., curriculum and training materials; factsheets, newsletters and other written materials; software, apps and decision aids development for Extension and presentations
- Summarize Extension stakeholder advising of agencies or organizations with which you engage
- Multi-state Extension committees with which you engage (if appropriate)
- Extension improvement and future plans

2.4. Institutional and Professional Service (expected of all faculty)
The following topics are addressed in this section (Include those that apply):
- Service responsibilities (including percent effort from PRS)
- Self-assessment of departmental, college, and university service
  - List committee memberships and/or leadership roles and comment on quality of contributions to these groups
- Self-assessment of service to college priorities such as diversity, international engagement, others
- Self-assessment of professional committees and professional service
  - List committee memberships and/or leadership roles and comment on quality of contributions to these groups
- Other professional service: journals and grant proposal review for funding agencies
- Honors and awards received for service related to teaching, research, extension and administration

2.5. Administration (only include if this is an element of your PRS)
The following topics are addressed in this section:
- Administration responsibilities and evaluation of impact
- Honors and awards for administration

3. Final Reflections (Optional)
This section provides an opportunity for you to make any closing comments if you choose.

Appendix 1: Definition of Key Terms and Concepts

Scholarship of Teaching and Learning (SoTL): "At Iowa State University, SoTL contributes to the discovery of knowledge about teaching and learning in higher education and must be held to the same standards of rigor, relevance, peer review, and dissemination as other forms of disciplinary research and creative activity." (ISU Faculty Handbook, 5.2.2.4). "The scholarship of teaching and learning goes beyond simply using effective or innovative teaching methods in the classroom, commonly called scholarly teaching. It involves inquiry into teaching, engagement, feedback, and reflection on teaching and learning. It also includes sharing results so others can review, critique and build on the work."
(Source: CELT Web site: http://www.celt.iastate.edu/for-faculty/sotl/)

Scholarship of Research/Creative Activities: "Faculty members who engage in research/creative activities are expected to make original contributions that are appropriate to their chosen area of specialization and that are respected by peers within and outside the university."
(Source: ISU Faculty Handbook, 5.2.2.4).

Scholarship of Extension: "Faculty members may engage in extension/professional practice activities by utilizing their professional expertise to disseminate information outside of the traditional classroom to help improve the knowledge and skills of their clientele (i.e., the publics they serve) or the environment in which they live and work." (Source: ISU Faculty Handbook, 5.2.2.5).

"The scholarship resulting from extension/professional practice activities is documented through means appropriate to the professional specialty, such as peer-reviewed publications, lectures, videos, software, hardware, workbooks, manuals, standards, bibliographies, book reviews, and casebooks. Evaluation of scholarship should consider breadth, depth, and duration of influence or use; public appreciation and benefit; and applicability or adoption by peers." (Source: ISU Faculty Handbook, 5.2.2.5).

Extension Programs: ISU Extension and Outreach asks faculty to organize their efforts through 'programs'. Programs are a coordinated set of learning experiences designed to achieve predetermined outcomes. Programs follow a continuum – starting with an initial environmental scanning, followed by application of the learning experiences, and resulting in changes in knowledge, behavior, and condition (as stated in the ISUEO program development process).

Outreach: In the CALS, faculty without formal extension appointments may be engaged in outreach efforts that range from very informal efforts (responding to requests for information, speaking at stakeholder conferences, developing a small number of outreach materials, etc.) to formal outreach programs that are very similar to formal extension programs and include a situational or needs analysis, stakeholder interactions, development and delivery of educational curricula, evaluation of outputs, outcomes and impacts.

Finalized: **April 19, 2016**

Filed at http://www.cals.iastate.edu/faculty-staff/promotiontenure