POLICY & PROCEDURES CHECKLIST FOR PORTFOLIO EVALUATION

According to Policy 352, 6.6, "colleges and departments shall document that they have followed all procedures; e.g., by a comprehensive checklist of the steps in the PTE process. The documentation must be included in the portfolio." **Originating at the department/unit level**, this checklist documents that University procedures have been followed at the different levels of review. **For each candidate**, the evaluating parties are requested to complete their section of the checklist, to sign, date and insert the form **as the first item** in the applicant's portfolio. The Dean is responsible for giving a copy of the completed form to the applicant.

Candidate's Name: _____

	Evaluator's Signature	Date
Department/Unit PTE Committee Chair	Signature: _____	Date: _____
Department/Unit PTE Chair or Head	Signature: _____	Date: _____
Chair College PTE Committee	Signature: _____	Date: _____
Dean of the College	Signature: _____	Date: _____
Other (e.g. Extension)	Signature: _____	Date: _____

Check "yes" for agreement or "N.A." if not applicable. *Be prepared to explain why an item is not applicable.*

Department Level Evaluation	PTE Committee	Chair
Solicitation of letters of review followed University's recommended model.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
In case of joint appointments, input from other units was requested and included.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Members were elected according to department's PTE standards.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Potential conflict of interest situations were identified/mitigated.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
No faculty member being considered for promotion served on PTE committee.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
No administrators, as identified by Policy 352, served on PTE committee	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Departmental voting procedures on applicant's candidacy were followed.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
The evaluation was based on the written standards and criteria of the department.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Candidate received letter of evaluation/recommendation by due date.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Candidate was accorded 14 calendar days to respond.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Department specific procedures were followed.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Committee deliberations were kept confidential.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
The department PTE document is consistent with Policy 352 and College PTE guidelines.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Portfolio was submitted to the college level by the due date.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
College Level Evaluation	**PTE Committee**	**Chair**
Members were elected according to College PTE document.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
No administrators, as identified by Policy 352, served on the College Committee.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Potential conflict of interest was identified/mitigated.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
No faculty member being considered for promotion served on PTE committee	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Information added conformed to materials listed in Policy 352, section 6.2.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
College and Dean reviews were conducted separately and independently of each other.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Evaluation was based on the written standards and criteria of the department and the college.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Candidate received copy of letter of evaluation/recommendation by due date.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Committee deliberations were kept confidential.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
The College's PTE document is consistent with Policy 352.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Portfolio was submitted to Provost by the due date.	☐ Yes ☐ N/A	☐ Yes ☐ N/A
Candidate received copy of the completed policy & procedures checklist.	☐ Yes ☐ N/A	☐ Yes ☐ N/A

Portfolio Cover Page for Promotion and Tenure 2017-2018

DEMOGRAPHIC DATA:

Name: Rank:

Department: College:

REQUESTED ACTION:

☐ Promotion to rank of: ☐ Request for tenure ☐ Penultimate year:

SPECIAL AGREEMENTS (check, if applicable)

☐ Previous Consideration (if candidate has been considered previously, but promotion and/or tenure were/was not awarded, supply letters of denial, outlining conditions needing to be addressed and place in section C).

☐ Prior Service Agreement (place in section E).

CANDIDATES SIGNED STATEMENT

I have reviewed the portfolio and believe it to be accurate, complete, current, and ready for review.

Signature Date

As any additional materials are included in the portfolio, copies must be provided to the candidate. The candidate will have 14 days to provide a written response.

If the faculty member was granted an extension of the probationary period for any reason, such an extension does not increase the expectations for performance.

Should the faculty member and Department Chair/Head disagree on the inclusion or exclusion on some material, the faculty member may indicate his/her objection in this signed statement.

COMMENTS:

_____

ADMINISTRATORS RESPONSIBLE FOR PORTFOLIO REVIEW:

ROUTING	
Portfolio Received:	**Date:**
Dept. PTE Committee	
Dept. Chair	
College PTE Committee	
College Dean	
Director	
Provost	
President	

ADDED MATERIALS INVENTORY

Materials Added: **By:**

Date:

VOTE TALLY

Number of Votes for:	**Tenure***			**Promotion**		
	Recommend	**Deny**	**Abstain**	**Recommend**	**Deny**	**Abstain**
Dept. PTE Committee	____	____	____	____	____	____
Dept. Chair	____	____	____	____	____	____
College PTE Committee	____	____	____	____	____	____
College Dean	____	____	____	____	____	____
Director	____	____	____	____	____	____
Provost	____	____	____	____	____	____
President	____	____	____	____	____	____

*Evaluations for promotion to Associate Professor and granting of tenure will ordinarily be conducted concurrently.

Department/Unit Signature Dean Signature

NORTH DAKOTA STATE UNIVERSITY

Promotion and Tenure Portfolio
Part I
[Report Start Date] - [Report End Date]

[[LAST NAME], [FIRST NAME] [MIDDLE NAME]]

C. Appointment Letter and Position Description / Special Agreements

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "C. Appointment Letter and Position Description / Special Agreements"
```

[Comment for Section]

C.1 Letter of Appointment

```
Screen: Permanent Data
Items:  All records
```

Letter of Appointment

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "C.1 Letter of Appointment"
```

[Comment for Section]

C.2 NDSU Job Descriptions

```
Screen: Academic, Government, Military and Professional Positions
Items:  All records
Criteria:
1.Organization contains one of the substrings: "NDSU", "North Dakota State"
```

[Title/Rank/Position], [Organization]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Brief Description: [Brief Description]

```
Screen: Promotion and Tenure (first record) > <strong>Files for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "C.2 NDSU Job Description"
```

File for Section

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "C.2 NDSU Job Descriptions"
```

[Comment for Section]

C.3 Administrative Assignments

```
Screen: Administrative Assignments
Items:  All records
```

[[Position/Role] or [Explanation of "Other"]], [Scope], [Unit], approximately [Approx. Number of Hours Spent Per Year] hours spent per year. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Responsibilities/Brief Description: [Responsibilities/Brief Description]
Accomplishments/Progress of Goals: [Accomplishments/Progress of Goals]

C.4 Prior Service Agreement of Tenure-Track Appointment *(if applicable)*

```
Screen: Permanent Data > Rank
Items:  All rows
```

Service Agreement

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
```

Commented [AR1]: Add "Brief Description" title

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```
Items:  All rows
Criteria:
1.Section is equal to "C.3 Prior Service Agreement of Tenure-Track Appointment"
```

[Comment for Section]

C.5 Previous Tenure/Promotion Consideration ***(if applicable)***

```
Screen: Permanent Data > Rank
Items:  All rows
```

Tenure/Promotion Consideration

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "C.4 Previous Tenure/Promotion Consideration"
```

[Comment for Section]

D. Academic Background

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "D. Academic Background"
```

[Comment for Section]

D.1 Degrees

```
Screen: Degrees
Items:  All records
Criteria:
1.Degree is not equal to "Post-Doctoral"
```

[[Degree] or [Explanation of "Other"]], [Emphasis/Major], [Supporting Areas of Emphasis], [Month Completed Year Completed]. [Institution], [Location of Institution]. [Advisor(s)]: [list of [**Advisor Information**] as "[Last Name], [First Name] [Middle Name/Initial]"].
Disquisition Title: [Dissertation/Thesis Title]

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "D.1 Education"
```

[Comment for Section]

D.2 Post-Doctoral / Additional Experience

```
Screen: Degrees
Items:  All records
Criteria:
1.Degree is equal to "Post-Doctoral"
```

[[Degree] or [Explanation of "Other"]], [Emphasis/Major], [Supporting Areas of Emphasis], [Month Completed Year Completed]. [Institution], [Location of Institution]. [Advisor(s)]: [list of [**Advisor Information**] as "[Last Name], [First Name] [Middle Name/Initial]"].
Disquisition Title: [Dissertation/Thesis Title]

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "D.2 Post-Doctoral/Additional Experience"
```

[Comment for Section]

D.3 Licensures and Certifications

```
Screen: Licensures and Certifications
Items:  All records
```

[Title of Licensure/Certification], [Sponsoring Organization], [State]. ([Month Obtained Day Obtained, Year Obtained - Expiration Month Expiration Day, Expiration Year]).
Description: [Description]

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "D.3 Licensures and Certifications"
```

[Comment for Section]

E. Academic Experience / Employment History

```
Screen: Academic, Government, Military and Professional Positions
Items:  All records
```

[Title/Rank/Position], [Organization]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).

Description: [Description]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "E. Academic Experience/Employment History"
```

[Comment for Section]

F. Statement of Context and Accomplishment

```
Screen: Promotion and Tenure (first record) > <strong>Files for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "F. Statement of Context and Accomplishment"
```

File for Section

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "F. Statement of Context and Accomplishment"
```

[Comment for Section]

G. Teaching, Advising, and Curriculum Development

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G. Teaching, Advising, and Curriculum Development"
```

[Comment for Section]

G.1 Courses Taught at NDSU and Student Ratings of Instruction

```
Screen: Scheduled Teaching
Items:  All records
```

Term	Course Number	Title	Credits	Enrollment	% Resp.	Q1	Q2	Q3	Q4	Q5	Q6
[Term] [Year]	[Course Prefix] [Course Number]-[Section Number]	[Course Name]	[Number of Credit Hours]	[Official Enrollment Number]	[Percent Responsible]	[Q1: Course Satisfaction]	[Q2: Instructor as Teacher]	[Q3: Instructor as Communicator]	[Q4: Course Quality]	[Q5: Grading Fairness]	[Q6: Understanding of Content]

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.1 Courses Taught at NDSU and Student Ratings of Instruction"
```

[Comment for Section]

a. SROI Open Ended Comments

Deleted: a.

```
Screen: Scheduled Teaching
Items:  All records
```

```
Criteria:
1.SROI Open Ended Comments has a value
```

[Term] [Year], [Course Prefix] [Course Number]-[Section Number]

SROI Open Ended Comments File

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G.2 Quality of Teaching (Administration and Peer Evaluation)

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.2 Quality of Teaching"
```

[Comment for Section]

File: [File for Section]

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a. Statement by Department Chair or Appropriate Unit Head

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.2a Statement by Department Chair"
```

[Comment for Section]

b. Statement by Peers

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.2b Statement by Peers"
```

[Comment for Section]

G.3 Curriculum Development

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.3 Curriculum Development"
```

[Comment for Section]

a. Contributions in Curriculum Development

```
Screen: Scheduled Teaching
Items:  All records
Criteria:
1.Describe any pedagogical innovations that you introduced into this course (e.g., international issues,
        computer applications, ethical analysis, new classroom techniques, etc.), Describe any new teaching
        material (e.g., cases, videotapes, audiotapes, course modules, instructor manuals, test banks, or
        simulations) that you developed and/or implemented, Describe any activities in your course that enhanced
        student learning and/or student contact with the community (e.g., guest speaker, outside projects, field
        trips, field projects, etc.) at least one has a value
```

Describe any pedagogical innovations that you introduced into this course: [Describe any pedagogical innovations that you introduced into this course (e.g., international issues, computer applications, ethical analysis, new classroom techniques, etc.)]

Commented [AR3]: Add title for each section

Describe any new teaching material: [Describe any new teaching material (e.g., cases, videotapes, audiotapes, course modules, instructor manuals, test banks, or simulations) that you developed and/or implemented]

Commented [AR4]: Add title

Describe any activities in your course that enhanced student learning and/or student contact with the community: [Describe any activities in your course that enhanced student learning and/or student contact with the community (e.g., guest speaker, outside projects, field trips, field projects, etc.)]

Commented [AR5]: Add title

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.3a Contributions in Curriculum Development"
```

[Comment for Section]

b. Educational Committees and Activities

```
Screen: Department
Items:  All records
Criteria:
1.Purpose is equal to "Teaching"

Screen: College
Items:  All records
Criteria:
1.Purpose is equal to "Teaching"

Screen: University
Items:  All records
Criteria:
1.Purpose is equal to "Teaching"

Screen: Professional
Items:  All records
Criteria:
1.Purpose is equal to "Teaching"

Screen: Public
Items:  All records
Criteria:
1.Purpose is equal to "Teaching"
```

[[Position/Role] or [Explanation of "Other"]], [Committee/Organization Name]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).

[[Position/Role] or [Explanation of "Other"]], [Committee/Organization Name]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).

[[Position/Role] or [Explanation of "Other"]], [Committee/Organization Name]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).

[[Position/Role] or [Explanation of "Other"]], [Organization/Committee/Club]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).

[[Position/Role] or [Explanation of "Other"]], [Organization/Committee/Club]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.3b Educational Committees and Activities"
```

[Comment for Section]

G.4 Academic Advising

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.4 Academic Advising"
```

[Comment for Section]

a. Description of Academic and Co-Curricular Advising

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.4a Description of Academic and Co-Curricular Advising"
```

[Comment for Section]

b. Formal Undergraduate Advising

Academic Year	Screen: Academic Advising	Screen: Academic Advising	Screen: Academic Advising	Screen: Academic Advising	Screen: Academic Advising

	Items: First record	Items: Second record	Items: Third record	Items: Fourth record	Items: Fifth record
	[Academic Year]	[Academic Year]	[Academic Year]	[Academic Year]	[Academic Year]
# Advised	[Number of Undergraduate Students Advised]	[Number of Undergraduate Students Advised]	[Number of Undergraduate Students Advised]	[Number of Undergraduate Students Advised]	[Number of Undergraduate Students Advised]

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.4b Formal Undergraduate Advising"
```

[Comment for Section]

c. Student Rating of Advising

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.4c Student Rating of Advising"
```

[Comment for Section]

d. Co-curricular Advising

```
Screen: Directed Student Learning (e.g., theses, dissertations)
Items:  All records
Criteria:
1.Involvement Type is equal to "Student Organization Advisor"
```

[Involvement Type] or [Explanation of "Other"]

[Student First Name] [Student Last Name] [Student Degree] ([Program]), [Graduation Semester:] [Graduation Semester Term] [Graduation Semester Year].[Organization]. Semester Started: [Semester Started Term] [Semester Started Year] [Stage of Completion]. [Semester Completed Term] [Semester Completed Year].
Comments: [Comments]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.4d Co-Curricular Advising"
```

[Comment for Section]

e. Undergraduate Student Researchers Mentored

```
Screen: Directed Student Learning (e.g., theses, dissertations)
Items:  All records
Criteria:
1.Involvement Type is equal to "Undergraduate Research Advisor"
```

[Student First Name] [Student Last Name] ([Program]), [Graduation Semester:] [Graduation Semester Term] [Graduation Semester Year].[Organization]. Semester Started: [Semester Started Term] [Semester Started Year] [Stage of Completion]. [Semester Completed Term] [Semester Completed Year].
Comments: [Comments]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.4e Undergraduate Student Researchers Mentored"
```

[Comment for Section]

f. K-12 Students Mentored

```
Screen: Directed Student Learning (e.g., theses, dissertations)
Items:  All records
Criteria:
1.Involvement Type is equal to "K-12 Mentor"
```

[Student First Name] [Student Last Name] [Student Degree] ([Program]), [Graduation Semester:] [Graduation Semester Term] [Graduation Semester Year].[Organization]. Semester Started: [Semester Started Term] [Semester Started Year] [Stage of Completion]. [Semester Completed Term] [Semester Completed Year].
Comments: [Comments]

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.4f K-12 Students Mentored"
```

[Comment for Section]

G.5 Graduate Student Advising

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.5 Graduate Student Advising"
```

[Comment for Section]

a. As Major Professor

```
Screen: Directed Student Learning (e.g., theses, dissertations)
Items:  All records
Criteria:
1.Involvement Type is one of: "Master's Thesis Committee Chair", "Dissertation Committee Chair"
```

Involvement Type

[Student First Name] [Student Last Name] [Student Degree] ([Program]), [Graduation Semester:] [Graduation Semester Term] [Graduation Semester Year].[Organization]. Semester Started: [Semester Started Term] [Semester Started Year] [Stage of Completion]. [Semester Completed Term] [Semester Completed Year].
Comments: [Comments]

b. As Examining Committee Member

```
Screen: Directed Student Learning (e.g., theses, dissertations)
Items:  All records
Criteria:
1.Involvement Type is one of: "Master's Thesis Committee Member", "Dissertation Committee Member", "Master's
        Advisor"
```

Involvement Type

[Student First Name] [Student Last Name] [Student Degree] ([Program]), [Graduation Semester:] [Graduation Semester Term] [Graduation Semester Year].[Organization]. Semester Started: [Semester Started Term] [Semester Started Year] [Stage of Completion]. [Semester Completed Term] [Semester Completed Year].
Comments: [Comments]

c. Postdoctoral Trainees

```
Screen: Directed Student Learning (e.g., theses, dissertations)
Items:  All records
Criteria:
1.Involvement Type is one of: "Postdoc Supervision"
```

[Student First Name] [Student Last Name] [Student Degree] ([Program]), [Graduation Semester:] [Graduation Semester Term] [Graduation Semester Year].[Organization]. Semester Started: [Semester Started Term] [Semester Started Year] [Stage of Completion]. [Semester Completed Term] [Semester Completed Year].
Comments: [Comments]

d. Other Trainees

```
Screen: Directed Student Learning (e.g., theses, dissertations)
Items:  All records
Criteria:
1.Involvement Type is one of: "Undergraduate Honors Thesis", "Undergraduate Capstone Project Advisor",
        "Internship Advisor", "Supervised Research", "Supervised Teaching Activity", "Other"
```

Involvement Type

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Commented [AR9]: Add "Comments" title
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Commented [AR10]: Add "Comments" title
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Commented [AR11]: Add "Comments" title
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[Student First Name] [Student Last Name] [Student Degree] ([Program]), [Graduation Semester:] [Graduation Semester Term] [Graduation Semester Year].[Organization]. Semester Started: [Semester Started Term] [Semester Started Year] [Stage of Completion]. [Semester Completed Term] [Semester Completed Year].
Comments: [Comments]

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G.6 Outreach Activities

```
Screen: Non-Credit Instruction Taught
Items:  All records

Screen: Consulting
Items:  All records
Criteria:
1.Consulting Type is equal to "Academic"
```

a. CONSULT

[[Consulting Type] or [Explanation of "Other"]], [Client/Organization], [Location]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Description: [Description]

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b. NCTEACH

[[Instruction Type] or [Explanation of "Other"]], [Course/Presentation Title], [Sponsoring Organization], [Number of Participants participant(s)]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Description: [Description]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.6 Outreach Activities"
```

[Comment for Section]

G.7 Personal / Professional Development to Improve Teaching/Extension Effectiveness

```
Screen: Faculty Development Activities Attended
Items:  All records
Criteria (is one of):
1.Purpose is equal to "Extension"
2.Purpose is equal to "Teaching"
```

Purpose

[[Activity Type] or [Explanation of "Other"]], "[Title]," [Sponsoring Organization], [City], [State], [Country]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Description: [Brief Description]

Commented [AR13]: Add "Description" title

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.7 Personal/Professional Development Activities"
```

[Comment for Section]

G.8 Teaching Awards and Honors

```
Screen: Awards and Honors
Items:  All records
Criteria:
1.Purpose is equal to "Teaching"
```

[Nominated for:] [Award or Honor Name], [Organization/Sponsor]. [Recognition Level]([Month Received Day Received, Year Received]).
Brief Description: [Brief Description/Explanation]

Commented [AR14]: Add "Brief Description" title

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "G.8 Teaching Awards and Honors"
```

[Comment for Section]

H. Research and Creative Activities

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "H. Research"
```

[Comment for Section]

H.1 Publications

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "H.1 Publications"
```

[Comment for Section]

H.1.1 Refereed

```
Screen: Intellectual Contributions
Items:  All values
Criteria:
1.Current Status is one of: "Published", "Accepted", "Submitted" and Was this peer-reviewed/refereed? is equal
        to "Yes"
```

Contribution Type

[list of [**Contributors**] as "[Last Name], [F. N.] [M. N.]"] ([Year Published]). [Title of Contribution.] In [list of [**Contributors**] as "[F. N.] [M. N.] [Last Name]"] [(Ed.),(s.),)] *[If this is part of a larger work (e.g., a chapter in a book, contribution to a magazine), Title of Larger Work]* ([Issue Number/Edition ed., vol. Volume, pp. Page Numbers or Number of Pages])[.] [City and State of Journal/Publisher]: [[Journal/Publisher/Proceedings Publisher]][.] Submitted: [Month Submitted Day Submitted, Year Submitted]. Accepted: [Month Accepted Day Accepted, Year Accepted]. [Web Address] [Current Status]
Role: [Describe your role]
Abstract: [Abstract]
File: [Store file]
Comments: [Comments]

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "H.1.1 Refereed"
```

[Comment for Section]

H.1.2 Not Refereed

```
Screen: Intellectual Contributions
Items:  All values
Criteria:
1.Was this peer-reviewed/refereed? is not equal to "Yes"
```

Contribution Type

[list of [**Contributors**] as "[Last Name], [F. N.] [M. N.]"] ([Year Published]). [Title of Contribution.] In [list of [**Contributors**] as "[F. N.] [M. N.] [Last Name]"] [(Ed.),(s.),)] *[If this is part of a larger work (e.g., a chapter in a book, contribution to a magazine), Title of Larger Work]* ([Issue Number/Edition ed., vol. Volume, pp. Page Numbers or Number of Pages])[.] [City and State of Journal/Publisher]: [[Journal/Publisher/Proceedings Publisher]][.] Submitted: [Month Submitted Day Submitted, Year Submitted]. Accepted: [Month Accepted Day Accepted, Year Accepted]. [Web Address] [Current Status]
Role: [Describe your role]
Abstract: [Abstract]
File: [Store file]
Comments: [Comments]

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
```

Commented [AR15]: Add "Submitted" to the current status criteria

Deleted:

Commented [AR16]: Sort **Contribution Type** drop down list as followed:

Journal Articles
Books
Chapters
Conference Proceedings
Extension Publications
Abstracts
Monographs
Book Review
Broadcast Media
Cited Research
Instructor's Manual
Law Review
Magazine/Trade Publication
Manuscript
Material Regarding New Courses/Curricula
Newsletter
Newspaper
Research Report
Software
Study Guide
Technical Report
Textbook
Translation or Transcription
Written Case with Instructional Material
Other

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```
Criteria:
1.Section is equal to "H.1.2 Not Refereed"
```

[Comment for Section]

H.1.3 Artistic and Professional Performances and Exhibits

```
Screen: Artistic and Professional Performances and Exhibits
Items:  All records
```

[[Type of Work] or [Explanation of "Other"]]. [list of [**Performers/Exhibitors/Lecturers**] as "[Last Name], [F. N.] [M. N.]"], "[Work/Exhibit Title]," [Name of Performing Group], [Sponsor], [Location (City, State, Country)]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).

Brief Description: [Brief Description]

Commented [AR17]: Add "Brief Description" heading

H.1.4 Media Contributions

```
Screen: Media Contributions
Items:  All records
```

[Media Type] or [Explanation of "Other"]

"[Media Title/Topic]," [Media Name], [Location]. ([Month Day, Year]).

Description: [Description]

Web Address: [Web Address]

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Commented [AR18]: Add "Description" and "Web address" headings and populate data for each section

H.2 Presentations

```
Screen: Presentations
Items:  All records
```

[Scope]

[list of [**Presenters/Authors**] as "[Last Name], [F. N.] [M. N.] ([Role])"], [Conference/Meeting Name], [[Presentation Type] or [Explanation of "Other"]], "[Presentation Title]," [Sponsoring Organization], [Location]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).

Abstract/Synopsis: [Abstract/Synopsis]

Presentation File: [Presentation File]

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Commented [AR19]: Add "Abstract/Synopsis" and "Presentation File" headings and populate data for that section

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "H.2 Presentations"
```

[Comment for Section]

H.3 Funded Proposals

```
Screen: Contracts, Fellowships, Grants and Sponsored Research
Items:  All records
Criteria:
1.Current Status is equal to "Funded"
```

[list of [**Investigators**] as "[Last Name], [F. N.] [M. N.] ([Role: Role Description])"], "[Title]," Sponsored by [Originating Sponsoring Organization], [Awarding Organization Is], $[Amount]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).

Abstract: [Abstract]

Award Letter: [Store file]

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Commented [AR20]: Add "Award Letter" heading and populate file for award letter

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "H.3 Funded Proposals"
```

[Comment for Section]

H.4 Pending or Rejected Proposals

```
Screen: Contracts, Fellowships, Grants and Sponsored Research
Items:  All records
Criteria:
1.Current Status is not equal to "Funded"
```

[list of [**Investigators**] as "[Last Name], [F. N.] [M. N.] ([Role: Role Description])"], "[Title]," Sponsored by [Originating Sponsoring Organization], [Awarding Organization Is], $[Amount]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Abstract: [Abstract]
Award Letter: [Store file]

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Commented [AR21]: Add "Award Letter" heading and populate file for award letter

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "H.4 Pending or Rejected Proposals"
```

[Comment for Section]

H.5 Creative Activities / Research and Development of New Items

```
Screen: Intellectual Property (e.g., copyrights, patents)
Items:  All records
```

[IP Type] or [Explanation of "Other"]

[list of [**Inventors**] as "[Last Name], [F. N.] [M. N.]"] "[Title]," Licensed to: [If patent has been licensed, to whom?], Assigned to: [If patent has been assigned, to whom?]. (Submitted: [Month Submitted to University Day Submitted to University, Year Submitted to University], Application: [Month of Application Day of Application, Year of Application], Approved: [Month Patent Approved Day Patent Approved, Year Patent Approved], Licensed: [Month Licensed Day Licensed, Year Licensed], Renewal: [Renewal Month Renewal Day, Renewal Year]).
Comments: [Comments]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "H.5 Creative Activities/Research and Development of New Items"
```

[Comment for Section]

H.6 Personal/Professional Development to Improve Research Effectiveness

```
Screen: Faculty Development Activities Attended
Items:  All records
Criteria:
1.Purpose is equal to "Scholarship/Research"
```

[[Activity Type] or [Explanation of "Other"]], "[Title]," [Sponsoring Organization], [City], [State], [Country]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Brief Description: [Brief Description]

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H.7 Research Awards and Honors

```
Screen: Awards and Honors
Items:  All records
Criteria:
1.Purpose is equal to "Scholarship/Research"
```

[Nominated for:] [Award or Honor Name], [Organization/Sponsor]. [Recognition Level]([Month Received Day Received, Year Received]).
Brief Description: [Brief Description/Explanation]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "H.6 Research Awards and Honors"
```

[Comment for Section]

I. Service

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "I. Service"
```

[Comment for Section]

I.1 Department Service

```
Screen: Department
Items:  All records
```

[[Position/Role] or [Explanation of "Other"]], [Committee/Organization Name]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Responsibilities: [Responsibilities/Brief Description]
Committee's Key Accomplishments: [Brief Description of Committee's Key Accomplishments]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "I.1 Department Service"
```

[Comment for Section]

I.2 College Service

```
Screen: College
Items:  All records
```

[[Position/Role] or [Explanation of "Other"]], [Committee/Organization Name]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Responsibilities: [Responsibilities/Brief Description]
Committee's Key Accomplishments: [Brief Description of Committee's Key Accomplishments]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "I.2 College Service"
```

[Comment for Section]

I.3 University Service

```
Screen: University
Items:  All records
```

[[Position/Role] or [Explanation of "Other"]], [Committee/Organization Name]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Responsibilities: [Responsibilities/Brief Description]
Committee's Key Accomplishments: [Brief Description of Committee's Key Accomplishments]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "I.3 University Service"
```

[Comment for Section]

I.4 Other Professional Service

```
Screen: Professional
Items:  All records
```

[[Position/Role] or [Explanation of "Other"]], [Organization/Committee/Club], [City], [State]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Responsibilities: [Responsibilities/Brief Description]
Committee's Key Accomplishments: [Brief Description of Committee's Key Accomplishments]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "I.4 Other Committee or Organization Involvement"
```

[Comment for Section]

I.5 Public Service

```
Screen: Public
Items:  All records
```

[[Position/Role] or [Explanation of "Other"]], [Organization/Committee/Club], [City], [State]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Responsibilities: [Responsibilities/Brief Description]
Committee's Key Accomplishments: [Brief Description of Committee's Key Accomplishments]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "I.5 Public Service"
```

[Comment for Section]

I.6 Personal/Professional Development to Improve Service Effectiveness

```
Screen: Faculty Development Activities Attended
Items:  All records
Criteria:
1.Purpose contains one of the substrings: "Leadership", "Service"
```

Purpose

[[Activity Type] or [Explanation of "Other"]], "[Title]," [Sponsoring Organization], [City], [State], [Country]. ([Start Month Start Day, Start Year - End Month End Day, End Year]).
Brief Description: [Brief Description/Explanation]

Commented [AR22]: Add "Brief Description" heading and data for section

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I.7 Service Awards and Honors

```
Screen: Awards and Honors
Items:  All records
Criteria:
1.Purpose contains the text "Service"
```

[Nominated for:] [Award or Honor Name], [Organization/Sponsor]. [Recognition Level]([Month Received Day Received, Year Received]).
Brief Description: [Brief Description/Explanation]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "I.6 Service Awards and Honors"
```

[Comment for Section]

J. Awards and Honors

```
Screen: Awards and Honors
Items:  Records not displayed above
```

[Nominated for:] [Award or Honor Name], [Organization/Sponsor]. [Recognition Level]([Month Received Day Received, Year Received]).
Brief Description: [Brief Description/Explanation]

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```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "J. Awards and Honors"
```

[Comment for Section]

K. Unit Promotion and Tenure Criteria

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "K. Unit Promotion and Tenure Criteria"
```

[Comment for Section]

K.1 Department PTE Document

```
Screen: Promotion and Tenure (first record) > <strong>Files for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
```

```
1.Section is equal to "K.1 Department PTE Document"
```

File for Section

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "K.1 Department PTE Document"
```

[Comment for Section]

K.2 College PTE Document

```
Screen: Promotion and Tenure (first record) > <strong>Files for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "K.2 College PTE Document"
```

File for Section

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "K.2 College PTE Document"
```

[Comment for Section]

L. Annual Review Reports

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "L. Annual Review Reports"
```

[Comment for Section]

L.1 All Annual Reviews

```
Screen: Promotion and Tenure (first record) > <strong>Files for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "L.1 All Annual Reviews"
```

File for Section

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "L.1 All Annual Reviews"
```

[Comment for Section]

L.2 Third Year Review Report

```
Screen: Promotion and Tenure (first record) > <strong>Files for Promotion and Tenure Report by Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "L.2 Third Year Review Report"
```

File for Section

```
Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by
        Section</strong>
Items:  All rows
Criteria:
1.Section is equal to "L.2 Third Year Review Report"
```

[Comment for Section]

NORTH DAKOTA STATE UNIVERSITY
Promotion and Tenure Portfolio
Part II

A. Recommendations

1. Department PTE Committee Recommendation Letter

```
Screen: Promotion and Tenure
Items:  First record
```

Department PTE Committee Recommendation Letter

2. Department Chair Recommendation Letter

```
Screen: Promotion and Tenure
Items:  First record
```

Department Chair Recommendation Letter

3. College PTE Committee Recommendation Letter

```
Screen: Promotion and Tenure
Items:  First record
```

College PTE Committee Recommendation Letter

4. College Dean Recommendation Letter

```
Screen: Promotion and Tenure
Items:  First record
```

College Dean Recommendation Letter

5. Provost Recommendation Letter

```
Screen: Promotion and Tenure
Items:  First record
```

Provost Recommendation Letter

6. President Approval/Recommendation Letter

```
Screen: Promotion and Tenure
Items:  First record
```

President Approval/Recommendation Letter

B. Letters of Evaluation *(not required)*

1. Internal Letters from NDSU Faculty, Staff, and Students

```
Screen: Promotion and Tenure (first record) > <strong>Letters of Evaluation (not required)</strong>
Items:  All rows
Criteria:
1.Type is equal to "Internal Letter from NDSU Faculty, Staff, or Students"
```

Letter

2. External Letters of Evaluation

```
Screen: Promotion and Tenure (first record) > <strong>Letters of Evaluation (not required)</strong>
Items:  All rows
Criteria:
1.Type is equal to "External Letter of Evaluation"
```

Letter