FORMAT & INSTRUCTIONS FOR PREPARING PROMOTION, TENURE AND PRE-TENURE REVIEW DOSSIERS
(AY 2024-2025, All Ranks, All Classifications)

ALL applicants will submit ALL dossier materials, in PDF format, via *Workflow* within Watermark Faculty Success, by the deadline specified by their school, if applicable, but no later than the deadline posted on the Provost's website (August 30 for dossier, July 31 for external review materials).

Note – school deadlines may be earlier than the posted deadline.

Review committees will have access to candidate materials via *Workflow* in Faculty Success.

Please review and adhere to the instructions for preparing and submitting the dossiers to be considered in the promotion, tenure, and pre-tenure review process.

Refer to the Provost's website regarding evidence of impact and contribution to scholarly or creative activities and research - https://www.usm.edu/provost/promotion-and-tenure.

Contact Kelly Lester (kelly.lester@usm.edu) with questions about eligibility or submission material, or John Amacker (john.amacker@usm.edu) with questions about Watermark Faculty Success.

EXTERNAL REVIEW MATERIALS NOW SUBMITTED VIA WORKFLOW!

External reviewers will now receive an emailed link to candidates' materials. External reviewers will be able to submit their confidential recommendations directly into Workflow and these will not be visible to the faculty member under review.

Candidates whose review requires external reviewers should pay special attention to Workflow's initial application submission screen. Unit-specific guidelines will determine which materials are visible to external reviewers. **External review materials will be due BEFORE the candidate's standard dossier.**

General Information for Dossier Submission

The presentation of materials is at the candidate's discretion; the current approved school and unit documents should guide the contents of each section of the dossier.

CV Template:

Similar to the Annual Review Report, the CV template will have links to any artifacts stored in Faculty Success. The final CV will need to be exported to PDF for upload into Workflow. Use the "Promotion and Tenure CV Template" report within Faculty Success. You may edit and add information to the report, but you must keep sections in the same order as they appear once generated in Faculty Success.

PDF File Guidelines:

Care should be taken to ensure that the materials are clear and easy to read. It is suggested that documents/items be exported to, saved as, or printed to PDF rather than scanned, whenever possible. This helps with both clarity and file size.

Scanned items should be scanned to PDF, not a .jpg or other image file type. Scanning in black and white can help with file size and clarity, but is not required. Please refer to the website for assistance and information on creating PDF documents.

Bookmarks:

Indicate the main sections within each area by a "Bookmark" in the PDF file. The Bookmark acts as a tab or divider in the online dossier.

> Example: In the research section file, have Bookmarks for Publications, Presentations, Grants, Performances, In Progress, etc.

Student Course Evaluations and Scheduled Teaching:

Similar to the annual review process, an embedded report for Scheduled Teaching will have links to the Student Course Evaluations for courses taught since Spring 2020. All prior semester course evaluations will need to be retrieved from SOAR. **Any evaluations since Spring 2020 will be automatically attached to your submission.**

Annual Evaluations from Workflow:

The 2019-2020, 2020-2021, 2021-2022, and Fall 2022 & 2023 Calendar Year annual evaluation reports are housed within Faculty Success Workflow. You'll need to download the annual evaluation report from within your Workflow history and save the exported .html file as a PDF file. See the instructions on the Provost's website. Feel free to contact john.amacker@usm.edu for help with this step.

EXTERNAL REVIEWER ACCESS INFORMATION

A new feature in Workflow allows External Reviewers to access certain dossier materials submitted through Workflow.

Candidates under a review that requires external review should plan to submit their materials during the summer. See your school guidelines for specific deadlines.

For candidates applying for promotion to professor, the process outlined in the Faculty Handbook requires confidential external reviewer letters (FH 5.5). Some schools may also require external reviewer letters for tenure/promotion to associate professor. Refer to your school's guidelines for more detailed information and deadlines *(note: the external review process may require earlier deadlines than are posted on the Provost's website)*.

Typically, the candidate under review provides the names of potential external reviewers to the school director or P&T committee chair. The director/school committee may identify other potential external reviewers. External reviewers will now receive an emailed link to candidates' materials. External reviewers can submit their confidential recommendations directly into Workflow, which will not be visible to the faculty member under review.

For more information regarding the submission process and the solicitation of external reviewers, refer to the Promotion and Tenure section on the Provost's website and the School's specific policies/ procedures.

2024-2025 Electronic Submission Guidelines & Checklist

In addition to the unit guidelines, both the Faculty Handbook and the following information should guide your dossier preparation.

DOSSIER ITEMS	FILE NAME *(All files must be in PDF format)*
A. PROMOTION AND TENURE DOSSIER DOCUMENTS	
School/Unit Guidelines	*SchoolName_guidelines*
Curriculum Vitae ☐ Current curriculum vita, using the report template in Faculty Success, with the percent contribution and impact factor of the journal indicated for each publication, if applicable.	*Lastname_Firstname_CV*
Personal Essay/Narrative Statement ☐ Personal narrative statement highlighting special accomplishments	*Lastname_Firstname_essay*
Annual Evaluations PRE-TENURE DOSSIERS SHOULD ALSO INCLUDE the Offier Letter: ☐ Annual evaluations for all years (most recent evaluation first, including pre-tenure review recommendation for tenure applications). NOTE: This should be a SINGLE file of ALL evaluations, not separate files for each year ☐ Pre-Tenure ONLY: copy of appointment letter with salary information redacted	*Lastname_Firstname_annualevaluations* *Lastname_Firstname_appointmentletter*
B. RESEARCH, SCHOLARSHIP, AND CREATIVE ACTIVITIES ☐ Items *such as* a listing of journal articles or full articles, listing of books or book chapters, list of successful grant applications, a summary of citations, links to recordings/performances, programs, etc., with appropriate supporting documentation according to the unit guidelines.	*Lastname_Firstname_Research*
C. TEACHING/LIBRARIANSHIP There will be **2 separate** files – one for teaching and one for all course evaluations (if applicable for librarianship):	*Lastname_Firstname_teaching* **OR** *Lastname_Firstname_librarianship* **AND** *Lastname_Firstname_course evaluations*
☐ Single PDF File - Teaching documents and activity ☐ Single PDF File - Mandatory student course evaluations administered during the previous semesters (in reverse chronological order). See instructions regarding course evaluations. Do *not* submit separate files for each semester or course.	
D. SERVICE **Summary of university, professional, and community service activities and any appropriate other activities. Documentation supporting the value and effectiveness of the service should also be included.	*Lastname_Firstname_service*

A. PROMOTION AND TENURE DOSSIER DOCUMENTS

UNIT GUIDELINES

Include a PDF of your unit/school guidelines for promotion and tenure.

CURRICULUM VITAE

Applicants should use the {CV Template – **Promotion and Tenure CV Template**} "report" from Faculty Success as the base template for the CV. The simplicity of the format is to ensure that there is a level of consistency in the content and location of information in the CV.

The template is available in the Report Menu in Faculty Success. When the report is run, it will populate with any data already entered into Faculty Success. Again, this is the base template. Even if you have not entered any information into Faculty Success, you will need to run this report to download the template.

The output is a Word document that you may edit if necessary. You will then upload the final version of the report (exported to PDF) once you have added the information. Note: information you add to the Word document does not automatically go into Faculty Success.

The information/heading text can be modified. For example, your discipline may use *Scholarly or Creative Activities*, whereas another may use *Research* when referring to publications, presentations, performances, etc. If a section does not apply to you, you may eliminate that section (i.e., grant funding or non-credit instruction taught, etc.). However, the sequence of the template sections and contents requested—unless not applicable to your discipline—may not be modified.

The Word document will need to be EXPORTED to PDF (rather than Save as PDF) for the hyperlinks for artifacts and URLs to work correctly. Before uploading the file, test that the links are active. *Do not rely solely on the links to artifacts as evidence in each area. PDF files should contain any materials that, if in a physical copy process, you would provide for reviewers.*

External reviewers will receive a unique URL link to access and review submitted materials in Workflow. External reviewers will be able to access any artifacts that show as a live link on the CV. Make sure to test the links before uploading. See the section on **External Reviewers** for more detailed information.

PERSONAL ESSAY/NARRATIVE STATEMENT HIGHLIGHTING SPECIAL ACCOMPLISHMENTS

Applicants may submit an essay/narrative statement highlighting special accomplishments. **These are limited to 3,000 words or less.**

Note: this equates to 6 single-spaced pages – which is longer than reviewing committees recommend. Attend one of the panel discussions for more information and suggestions on preparing the statement.

ANNUAL EVALUATIONS – All years

Annual evaluations for all years (most recent first) should be a SINGLE file of ALL evaluations (not separate files for each year). **Tenure-track faculty should include the Pre-Tenure Review evaluation in the dossier.** See the Provost's website for more information on how to Download prior submissions.

B. RESEARCH, SCHOLARSHIP, AND CREATIVE ACTIVITIES

This section includes appropriate items of supporting documentation as described in your unit guidelines. Examples include a summary listing of articles, presentations, performances, etc.; external links to electronic copies of documents, videos, etc.; summary of successful grant applications; summary of citations, solicited letters of support, etc. For books/chapters, maybe include a copy of the front and back covers and a link (if available). Refer to the Provost's website for the documentation requirements for multi-authored and peer-reviewed/refereed publications or activities. This section may or may not apply for teaching track faculty seeking promotion. *Consult your unit criteria/guidelines and talk with your school director for more guidance.*

C. TEACHING/LIBRARIANSHIP

This section file includes documentation of the effectiveness of teaching or librarianship. Faculty with teaching responsibilities should include the official mandatory student course evaluations administered during previous semesters (teaching). Note that course evaluations for all semesters BEFORE Spring 2020 are available in SOAR. Course evaluations from Spring 2020 will be available in Faculty Success and accessible via a link on the Scheduled Teaching report. *Check unit guidelines and criteria for any additional specific information to be included.*

Scheduled Teaching - Similar to the annual review process, an embedded report for Scheduled Teaching will have links to the *Student Course Evaluations*, beginning with Spring 2020. All prior semesters will need to be retrieved from SOAR.

D. SERVICE

This section file will include a summary of university, professional, and community service activities, etc. Documentation supporting the value and effectiveness of the service should also be included.