What Goes Where?
Preparing Materials in eFaculty

All SJSU faculty are provided with an eFaculty account as part of the “one.SJSU” account suite. As you read this guide, you will see that eFaculty has components that help 1) faculty organize and report their activities, 2) administrative staff organize faculty evaluation materials (e.g., SOTE/SOLATEs), and 3) peer reviewers and administrators review and make recommendations and decisions about faculty matters.

This guide was developed primarily for faculty undergoing review. It represents a sweeping expansion of the RTP Dossier Format Guide, which is Part 6 here. Part 6 still serves as the official format guide for all RTP dossiers. In eFaculty, however, the conceptual layout of faculty professional responsibilities used for RTP dossiers may now be used for other purposes. We hope eFaculty becomes a tool you can use to more efficiently and effectively tell your story.

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Test evidential documents for translation into RPT.  
Convert your files to PDF before uploading.  
When organizing material, more is less.  
Enter activity dates as semesters and years.  
Fill all information fields for activities you enter, and enter information often.  
Check the FAQ and Help Resources.  
Preparing the Dossier for Review - Previewing and Submitting  
Previewing the Dossier  


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Part 1. Quick Overview of eFaculty

Introduction
SJSU uses eFaculty to conduct all periodic evaluations for probationary, tenured, and lecturer faculty, performance reviews for tenure track and tenured faculty, and range elevation for lecturers. It simplifies and reduces effort for faculty, and it facilitates review by committees and administrators. Interfolio is the vendor for eFaculty, which was so-named by SJSU faculty.

Each faculty member reports activities in an interface organized around traditional duties of probationary and tenured faculty (i.e., teaching, research, and service). However, each faculty member may enter as much (or as little) information about their professional accomplishments as they like. Reviewers only see section headers into which faculty have entered information or deposited evidential materials.

University Personnel - Faculty Affairs (UP - FA) administers all faculty periodic evaluations, performance reviews, and range elevation. UP - FA issues calendars for evaluations, manages eFaculty, maintains compliance with regulations (e.g., CSU/CFA contract, SJSU policies), and produces helpful guides to assist faculty through reviews. The main point of contact is eFaculty@sjsu.edu. Faculty looking for strategies and advice to earn higher reviews may contact the Center for Faculty Development (CFD) at this address: cfd@sjsu.edu.

One may enter eFaculty from the “one.SJSU Spartan App Portal.” Just click the eFaculty icon as seen below. Faculty activities reporting takes place in Faculty 180; reviews are completed in RPT.

Figure 1. one.SJSU Spartan App Portal: eFaculty's Upper Left Sidebar & Lower Left Sidebar

Faculty 180
Faculty activity reporting (FAR) is done via Interfolio’s “Faculty 180” product (F180), upper left sidebar. Faculty 180 serves as a virtual warehouse for accomplishments. Individual faculty members are responsible for entering most documentation and evidence. However, following a joint venture among University Personnel, Information Technology, and Institutional Research, required elements of review are entered automatically. These items include all classes taught, by semester, and all student evaluations (SOTEs and SOLATEs).
Review, Promotion and Tenure
Committees, Chairs, and Administrators examine items submitted for review, and submit evaluations of submitted materials, in eFaculty’s Review, Promotion and Tenure (RPT) area, lower left sidebar. This software generates a seamless view of faculty materials in a pdf-style reader. It has features that allows reviewers to collaborate and submit evaluations, see prior evaluations, and for faculty to enter responses to evaluations.

eFaculty Home Page
The home page in eFaculty will premiere items that require your attention. A click on the links will take you to where you need to be to complete the actions.

Your Packets
Those undergoing review will eventually have a “packet” generated for them. Keep an eye out for your packet to be generated. Once generated, the packet should contain all items to be submitted for that review. By selecting “Your Packets” in the upper left sidebar, you will be taken to an entry page that lists the review that you are to undergo (image below). Click either hyperlink to see the materials slated for review.

Figure 2. Your Packets
By following the hyperlinks to the packet, one will see a button to “Preview Packet” (see next image) Choosing “Preview Packet” takes one to a document reader that mimics what reviewers will see. You should see your materials the ways reviewers will see them. Plan revisions with this view in mind.

Figure 3. Preview Packet

Activities
The “Activities” area found in the left sidebar under Faculty 180 is the most important area in eFaculty for those being reviewed. It is the repository for reporting all professional activities related to employment with San José State University. See image in Figure 4 on the next page.
The activities section is broken down into “tabs” for reporting purposes. The faculty member enters information about, and places evidence of, their activities and performance under the appropriate tab. There is help language under each tab to guide faculty as to what is appropriate for that section. Questions about where to place an item may be directed to one’s chair, the Center for Faculty Development, or University Personnel - Faculty Affairs (eFaculty@sjsu.edu).

The first 5 tabs in “Activities” are reserved for review front matter such as forms and required documents related to the review. As a rule, tenure line faculty will never use the first 2 tabs, while “temporary faculty” will never use tabs 3 - 5, dedicated to the review of tenure line faculty. Tabs 6 - 9 establish context for review. There is prior appointment information (i.e., appointment letter and prior evaluations) and items that the candidate must update (i.e., CV and Narrative Statement, if applicable).

The remaining tabs are organized around the 3 areas of professional responsibility: “Academic Assignment,” teaching for most, “Service,” and “Research, Scholarship, and Creative Activities.” Each of these sections begins with a tab for an optional “Narrative.” The optional narrative sections allow faculty to explain details of their record in that area of professional responsibility, and allows them space to advocate for a higher assessment of their activities.

The final tab, “External Career Reviews,” allows solicitation of external reviews of the faculty member’s career. This optional section.

**Classes Taught at SJSU**
One tab deserves special attention. That is the “Classes Taught at SJSU” tab. It is preloaded with classes taught and student evaluations of teaching.

*Classes Taught During the Review Period*
The Classes Taught at SJSU section is prefilled with all scheduled classes attributed to the faculty member. Review timeline parameters determined by the “period of review” are preset in eFaculty when cases are set up for review. The classes cannot be edited by the faculty member. Therefore, to correct an error (e.g., Someone else taught the class, a class is missing) please contact UP - FA at eFaculty@sjsu.edu.

*SOTE/SOLATEs During the Review Period*
All student evaluations from spring semester 2013 going forward are preloaded in eFaculty. Of course, University Policies F12-6 and S20-4 allow faculty to remove some SOTEs or SOLATEs from the Working Personnel Action File (WPAF) under a set of conditions. F12-6 allows removal of 1 class per review year, if faculty were evaluated in 15 WTUs of instruction during that year (AY for tenure line faculty reviews, calendar year for most lecturer reviews). S20-4 is more broad, allowing any SOTE or SOLATE recorded in Spring 2020 to be removed from any evaluation or review. F12-6 also establishes some conditions for not collecting student evaluations.
Figure 4. The “Activities” Tabs
To remove student evaluations, simply delete the file in eFaculty. Recall that faculty are under obligation to report missing student evaluations. To do so, a statement, preferably on department letterhead, should be uploaded in place of any missing SOTEs or SOLATEs.

Suggested language includes:

“Pursuant to F12-6, the official SOTE/SOLATE for [Course.Section] has been removed from the WPAF. There are at least 12 WTU$s of courses that students evaluated in [AY Year-Year or CY Year] remaining in the WPAF.”

“Pursuant to S20-4, the official SOTE/SOLATE for [Course.Section] in Spring 2020 has been removed from the WPAF.”

Pursuant to F12-6, the official SOTE/SOLATE for [Course.Section] was not conducted in [semester/session Year] because [there were 5 or fewer students; there were fewer than 9 students and I requested they not be conducted; other substantiated reason].

SOTE$s and SOLATE$s are automatically uploaded to eFaculty through a process that matches them with preloaded information in “Classes Taught at SJSU.” Occasionally, a SOTE or SOLATE cannot be matched with a class. Under these circumstances, the SOTE/SOLATE is diverted to another tab in the FAR called, “Additional Student Evaluations.” It is up to the faculty member to decide whether they want to leave the SOTE/SOLATE in that tab, or move it to their classes tab (which may require the assistance of UP - FA to create another class in that section). The faculty member has the final say where items are located. They may leave SOTE/SOLATE$s distributed across the 2 tabs.

Part 2. Overview of “Temporary” Faculty Evaluations

Each faculty review type has a target group of faculty members, required documents provided by the faculty member and the University, and guidelines determined by the collective bargaining agreement and campus policies. Faculty are encouraged to read each carefully as this guide does not provide detailed discussion of them.

Pursuant to Article 15.12 a. of the CSU/CFA Collective Bargaining Agreement (CBA), faculty members subject to review “shall be responsible for the identification of materials [they] wish to be considered, as well as materials required by campus policy, and for the submission of such materials as may be accessible to [them].” The failure to submit required documentation or otherwise cooperate in the evaluation process may be taken into consideration of merit in the faculty member’s evaluation.

Annual Evaluation

Lecturer faculty are subject to periodic evaluation according to the conditions below.

Performance in all assignments related to their appointment (e.g., teaching in assigned classes, performance as program coordinator, lab supervisor) is assessed.

See CBA, Article 15, special attention to 15.23 and 15.24; University Policies S10-7, F12-6 & S20-4; SOTE/SOLATE Interpretation Guide.
Faculty Subject to Annual Evaluation

Lecturers typically undergo evaluation on an annual basis. The minimum conditions for such evaluations are:

1. All full-time (1.0 FTE) and part-time (less than 1.0 FTE) lecturers who have been appointed for two or more semesters, but not holding a three (3) year appointment, must be evaluated annually.
2. All full-time and part-time temporary faculty with three (3) year appointments must be evaluated at least once during the three-year appointment term, but as a best practice, may be evaluated more frequently. At minimum, an annual evaluation should occur in the second year of the 3 years.
3. Although not required, a lecturer who has been appointed for only one semester or less may be evaluated at the discretion of the department chair or appropriate administrator.

Materials to be Submitted

At minimum, reviewers must use the following evidence to evaluate faculty performance during the period of review, in this case, the prior calendar year:

1. The faculty member’s Annual Summary of Achievements (ASA-L form); go to the Activities tab, “Review: Annual/Cumulative Evaluation of Lecturers,” and upload the ASA-L filled out, or enter information directly into the fields in eFaculty.
2. All available standardized student data (SOTE/SOLATEs) during the evaluation period; Spring 2013 to present are automatically entered into the “Classes Taught at SJSU” or the “Additional Student Evaluations” tabs. Missing evaluations must be accounted for.
3. All direct observation(s) conducted by faculty peers; upload these to the “Direct Observations of Teaching” tab. Missing direct observations must be accounted for.

Faculty members may submit additional documentation from the period of review, such as syllabi, course assignments, evaluations of non-teaching duties, and official documentation of professional qualifications. Find the appropriate “Activities” tab to direct-enter the information and/or upload supporting evidence.

The department or appropriate administrator may enter evidence into the WPAF as well. Copies of materials entered this way must be given to the faculty member before the first level of review begins.

Evaluation Steps

Department

Full-time (1.0 FTE) lecturers must be department peer evaluation.

Full-time (1.0 FTE) Temporary Faculty:

A Department committee of tenured faculty elected by the probationary and tenured faculty conducts the evaluation.

If the Department Chair is not part of the committee, the Chair may submit a separate recommendation as part of the evaluation process.
Part-time Temporary Faculty:
Each Department determines whether the Department evaluation will be completed by the Chair alone or by the department’s elected personnel or other committee comprised of tenured faculty.

College
The Dean or other college administrator such as an associate dean reviews all faculty members. The college is the final level of review in annual evaluations.

Cumulative Evaluation
Cumulative Evaluations are conducted to qualify lecturer and temporary librarian faculty for Initial or Renewal of Three (3) Year Appointments (commonly called “entitlement” at SJSU). Initial appointments follow 6 consecutive academic years of appointments and are subject to “satisfactory” rating on cumulative evaluation, while renewals follow the 3rd year of a Three-Year Appointment and are subject to “satisfactory” rating on cumulative evaluation.

Cumulative Evaluation may occur during the same cycle as an annual evaluation. In those instances, the annual and cumulative evaluation materials shall appear simultaneously, and reviewers will perform each evaluation as appropriate.

See CBA, Article 15, special attention to 15.28 and 15.29; University Policies S10-7, F12-6 & S20-4; SOTE/SOLATE Interpretation Guide.

Faculty Subject to Cumulative Evaluation
All lecturers, or “temporary faculty” (excluding coaches) who have served six consecutive years are eligible for an Initial Three (3) Year Appointment. They are subject to Cumulative Evaluation in the 6th year.

All temporary faculty in the 3rd year of a Three (3) Year Appointment are eligible for a Renewed Three-Year Appointment subject to Cumulative Evaluation in their 3rd year. Cumulative evaluations should be completed even if the faculty member did not teach during the 3rd or any other year of a Three-Year Appointment.

Materials to be Submitted
At minimum, reviewers must use the following evidence to evaluate faculty performance during the period of review, in this case, the prior 6 (for initial) or 3 (for renewal) academic years:

1. All ASA-Ls from the period of review; these may be entered in Activities tab, “Review: Annual/Cumulative Lecturer Evaluations” or they may have been stored with prior annual evaluations located in “Prior Evaluations and Reviews” (no need for double placement).

2. All SOTE/SOLATEs during the evaluation period; Spring 2013 to present are automatically entered into the “Classes Taught at SJSU” or the “Additional Student Evaluations” tabs. Missing evaluations must be accounted for.
3. All direct observation(s) conducted by faculty peers during the period of review; upload these to the “Direct Observations of Teaching” tab. Missing direct observations must be accounted for.
4. All annual evaluations conducted during the period of review. These are placed in the tab, “Prior Evaluations and Reviews.”

Faculty members may submit additional documentation from the period of review, such as syllabi, course assignments, evaluations of non-teaching duties, and official documentation of professional qualifications. Find the appropriate “Activities” tab to direct-enter the information and/or upload supporting evidence.

The department or appropriate administrator may enter evidence into the WPAF as well. Copies of materials entered this way must be given to the faculty member before the first level of review begins.

Evaluation Steps

Department
A duly elected department personnel committee of tenured faculty shall evaluate and rate the faculty as “Satisfactory” or “Unsatisfactory.” Department evaluators may elaborate with formative statements if their rating is “Satisfactory.”

If the Department Chair is not part of the committee, the Chair may submit a separate recommendation as part of the evaluation process.

College
The Dean or other college administrator such as an associate dean reviews all faculty members. The college is the final level of review in cumulative evaluations.

Range Elevation
Range elevation is the advancement of a lecturer or temporary librarian faculty unit employee from one salary range to the next (e.g., L-A to L-B), accompanied with a raise, following a campus review process. The period of review is the time since entry into the current range. See CBA 12.16 - 12.20, 2016 and 2020 MOUs in TL HR/Salary 2017-14, Supplement 1; University Policies S10-7, F12-6 & S20-4; SOTE/SOLATE Interpretation Guide.

Faculty Eligible to Apply for Range Elevation
There are 2 ways to qualify for range elevation. Lecturers must have:

1. Served at least 5 years in their current range in a department and have no more remaining eligibility for Service Salary Increases (SSIs);
2. 6 or more years of FTAS accrued in a department as of the fall an application is submitted. FTAS is defined as the sum of the average time bases (FTE) worked over prior academic years, each divided by 0.8, yielding up to a maximum of 1.0 for any academic year.
Materials to be Submitted
The following items from the period of review are required for Range Elevation applications:

1. Index of all material being submitted; place in Activities tab, “Review: Lecturer Range Elevation.”
2. Curriculum Vitae (CV); upload to same-named tab.
3. All prior periodic evaluations for the period under review; upload to same-named tab
4. All official SOTEs and/or SOLATEs; Spring 2013 to present are automatically entered into the “Classes Taught at SJSU” or the “Additional Student Evaluations” tabs. Missing evaluations must be accounted for.
5. Direct Observations of teaching; upload these to the “Direct Observations of Teaching” tab. Missing direct observations must be accounted for.
6. Narrative: Description and Evidence of Professional Growth and Development. Explain professional progress toward becoming a more effective lecturer—growth that enhances abilities to teach and perform other duties (as applicable to assignment) in the discipline, and that supports the mission of the university; place the narrative in the tab, “Candidate’s Narrative Statement.”
7. Evidence of activities and achievements that demonstrate merit and support range elevation (e.g., terminal degree earned, specialized knowledge/training, professional experience/expertise, patents, effective advising/supervision, innovative/advanced teaching, leadership in service or governance, technical support of labs, comparative student achievement, professional honors); see S10-7, Appendix A. Documentation of professional progress, evidence, and activities referred to in the narrative. Find the appropriate “Activities” tab to direct-enter the information and/or upload supporting evidence.

The department or appropriate administrator may enter evidence into the WPAF as well. Copies of materials entered this way must be given to the faculty member before the first level of review begins.

Evaluation Steps
Department
A duly elected department personnel committee of tenured faculty shall evaluate and recommend whether to grant range elevation or not. The recommendation is explained in writing.

If the Department Chair is not part of the committee, the Chair may submit a separate recommendation as part of the evaluation process.

College
The Dean or other college administrator such as an associate dean reviews all faculty submissions for range elevation. They make a recommendation to the Provost with reasons explained in writing.
Provost
The Provost is delegated by the President to make the final decision on range elevation.

Part 3. Overview of Special Faculty Evaluations

There are multiple faculty evaluation types that apply to both lecturers and tenure line faculty. These involve an evaluation of an application for leave or assigned time.

Sabbatical
A sabbatical leave is intended to benefit the University by affording faculty time to take advantage of professional development opportunities such as conducting research, engaging in scholarly and creative activities, improving instruction, or obtaining faculty retraining.

Faculty Eligible to Apply for Sabbatical
A full-time faculty unit employee is eligible for a sabbatical leave so long as they have worked full-time at this campus for six (6) of the seven (7) years preceding the leave, and at least six (6) years after any previous sabbatical or difference in pay leave. Credit granted toward the completion of the probationary period for service elsewhere applies towards fulfilling the eligibility requirement.

Eligibility lists are distributed each fall. Candidates wishing to apply must notify UP - FA of their intention to apply. A case will be established, and an email invitation to apply will be sent to the SJSU email address.

Materials to be Submitted
While in eFaculty, the sabbatical application does not make use of FAR in F180. Instead, all materials are submitted and the reviews take place in the RPT component.

1. Sabbatical Application
2. Updated CV
3. Sabbatical Project Plan

Evaluation Steps

Department
The Department Chair makes a statement about the likely impact on the department.

College
A duly elected college sabbaticals committee of full professors representing college departments shall evaluate and rank applications, and explain their recommendations.

The Dean or other college administrator such as an associate dean reviews all faculty submissions for sabbatical. They rank applications and make a recommendation to the Provost with reasons explained in writing.
A duly elected University Sabbatical Leaves Committee (USLC) of full professors representing colleges evaluates and ranks the applications. Reasons for recommendations are written.

**Provost**
The Provost is delegated by the President to make the final decision on sabbaticals.

**Other Special Faculty Evaluations**
Other faculty opportunities include Difference in Pay Leaves (DIP) and Assigned Time for Exceptional Levels of Service to Students. These and other opportunities requiring multiple level and committee review may be established in eFaculty. Like sabbatical review, they will not rely on FAR, and all submissions and review will occur in RPT.

**Part 4. Overview of Probationary and Tenured Faculty Evaluations**

**Periodic Evaluation of Probationary Faculty - Mini Review**
The primary purpose of the periodic evaluation of probationary faculty is developmental--to provide the candidate with a formative review of the 3 categories of achievement in University Policy S15-8, so as to encourage professional growth that will merit the award of tenure, and advancement in rank if applicable, by the end of the probationary period.

*See CBA Article 15, special attention to 15.31 - 15.34; University Policies S15-7, S15-8, F12-6 & S20-4; SOTE/SOLATE Interpretation Guide.*

**Faculty Subject to Mini Review**
All probationary faculty members who are not undergoing a performance review (i.e., retention, promotion and/or tenure) must undergo periodic evaluation.

**Materials to be Submitted**
At minimum, reviewers must use the following evidence to evaluate faculty performance during the period of review, in this case, the time since a) appointment, b) last periodic evaluation, or c) last performance review:

1. Annual Summary of Achievements - Probationary (ASA-P); directly enter or upload the ASA-P to Activities tab, “Review: Periodic Evaluation of Probationary Faculty - Mini Review”
2. Curriculum Vitae (CV); upload to same-named tab.
3. All SOTE/SOLATEs; Spring 2013 to present are automatically entered into the “Classes Taught at SJSU” or the “Additional Student Evaluations” tabs. Missing evaluations must be accounted for.
4. Direct Observations of teaching (or equivalent); upload these to the “Direct Observations of Teaching” tab. Missing direct observations must be accounted for.
5. All prior Periodic Evaluations and Performance Reviews since initial appointment; upload to same-named tab
Faculty may submit additional material. Since mini review is intended to help faculty grow into successful careers, all FAR materials since initial appointment in Faculty 180 will be available to reviewers.

The department or appropriate administrator may enter evidence into the WPAF as well. Copies of materials entered this way must be given to the faculty member before the first level of review begins.

**Evaluation Steps**

**Department**
A duly elected department personnel committee of tenured faculty shall evaluate and provide formative statements to help the faculty member improve their performance and eventually attain tenure.

If the Department Chair is not part of the committee, the Chair may submit a separate recommendation as part of the evaluation process.

**College**
The Dean or other college administrator such as an associate dean reviews all mini review submissions. The college is the final level of review in periodic evaluations of probationary faculty.

**Periodic Evaluation of Tenured Faculty - Post Tenure Review**
The overall purpose of this periodic evaluation is maintaining and improving tenured faculty effectiveness. At SJSU, the emphasis of Post Tenure Review (PTR) is on evaluation of the effectiveness of the faculty member in terms of the scope and currency of their professional work, with reference to their current and future professional career plans. The review, to the extent possible, is a positive, formative, and proactive approach to enhancing faculty careers. See CBA Article 15, special attention to 15.35 - 15.37; University Policies S97-5, F12-6 & S20-4; SOTE/SOLATE Interpretation Guide.

**Faculty Subject to Post Tenure Review**
Tenured faculty are subject to periodic evaluation at intervals of no greater than five (5) years since their last periodic evaluation or performance review. FERP faculty are excluded from review.

**Materials to be Submitted**
Faculty write a review of their performance during the period of review, which is the time since their last periodic evaluation or performance review. Faculty are responsible for collecting and submitting into eFaculty all evidence required to support their review. Normally, faculty activities reporting should be filed into “Activities” tabs in F180. However, many PTR are unfamiliar with eFaculty. Therefore, PTR faculty are allowed to upload a single document (or set of documents) containing their review solely into the “Review: Periodic Evaluation of Tenured Faculty - Post Tenure Review” Activities tab in F180.
Required PTR items include:

1. Post Tenure Review Statement. Upload to F180 Activities tab, "Review: Periodic Evaluation of Tenured Faculty - Post Tenure Review." Elements of the required review include:
   I. Review of Teaching
      Review of teaching is required for those with teaching assignments.
   II. Professional Currency
      Currency pertinent to the professional assignment of the faculty member shall be discussed. Evidence of professional development, engagement, and practice may be uploaded to appropriate Activities tabs.
   III. Reflective Model (elective)
      Faculty may elect to engage in a reflective model focusing on their professional career, and should discuss any professional development plan(s).
   IV. Other Materials (elective)
      Faculty may discuss any other professional dimensions and upload other associated evidence or materials.

2. Last performed periodic evaluation or performance review; upload to “Prior Evaluations and Reviews” tab.

3. Updated CV; upload to “Curriculum Vitae (CV)” Activities tab.

4. Evidence of teaching effectiveness
   a. All SOTE/SOLATE ratings
      i. Missing items must be accounted for
      ii. Spring 2013 to present are automatically entered into the “Classes Taught at SJSU” or the “Additional Student Evaluations” tabs
   b. Any Direct Observations (peer review) of teaching
      i. Missing items must be accounted for.
      ii. Uploaded to the “Direct Observations of Teaching” tab.
   c. Other evidence of teaching effectiveness should be uploaded to appropriate Activities tabs.

Faculty may submit other evidence to support their PTR narrative. The department or appropriate administrator may enter evidence into the WPAF as well. Copies of materials entered this way must be given to the faculty member before the first level of review begins.

*Evaluation Steps*

*Department*

A duly elected department personnel committee of tenured faculty with rank shall evaluate and provide formative statements to help the faculty member maintain or improve professional effectiveness.

If the Department Chair is not part of the committee, the Chair may submit a separate recommendation as part of the evaluation process.
College
The Dean or other college administrator such as an associate dean reviews all mini review submissions. The college is the final level of review in periodic evaluations of tenured faculty.

RTP Performance Review
Performance review is required to attain retention during probationary status, tenure, and/or promotion. Retention reviewers must maintain a formative perspective, but retention is not granted if tenure is deemed unlikely to occur. Tenure and promotion reviews are more critical, with feedback explaining reasons for performance ratings. RTP reviews have multiple steps of peer and administrator scrutiny and recommendations, ending with a decision by the President (or Provost if designated by the President). See Figure 5 for more information.
See CBA Article 15, special attention to 15.38 - 15.48; University Policies S98-8, S15-7, S15-8, F12-6 & S20-4; SOTE/SOLATE Interpretation Guide.

Faculty Subject to RTP Performance Review
Faculty in their 3rd service year (or 4th for those appointed with 2 years credit) undergo review for retention. Faculty undergo promotion to associate rank and/or tenure review in their 6th service year. Faculty may submit for promotion to full rank in their 5th year at associate rank or later.

Materials to be Submitted
RTP performance reviews require examination of a “full dossier,” or extensive WPAF. Reviewers expect to see robust reporting of faculty accomplishments in the faculty activities reporting area of eFaculty (F180). Faculty should report and submit evidence of all teaching or academic assignment, service, and research, scholarship, and creative activities. There are strict deadlines for submitting the dossier and for its subsequent review. There is a short window for late-add submissions. See the RTP Calendar for more information.

The remainder of this document should help with organizing the dossier. The Center for Faculty Development offers dossier preparation services to help faculty put forward their best case for advancement in the review process.

RTP Evaluation Steps

Department
A duly elected department personnel committee of tenured faculty with rank shall evaluate and provide statements to help the faculty member maintain or improve professional effectiveness and to explain their recommendations.

If the Department Chair is not part of the committee, the Chair may submit a separate recommendation as part of the evaluation process.
Figure 5. RTP Evaluation Steps

RTP Performance Reviews
1. Dossier Preparation, 2. Review Levels, 3. Late Add, and 4. Decisions

1. Prepare Dossier for Review
   - Faculty Notification of Intent for Review to UP – FA and Chair
   - Chair’s Description of Academic Assignment
   - Unrestricted Materials to Chair or Dean

2. UP - FA Releases Dossier for Department Level Review in eFaculty
   - Department Committee
   - Chair/Director
     - Chair/Director (if not on committee and is Full Professor)
   - Faculty

3. Updated Dossier in eFaculty
   - Optional Late-Add Period
   - Accepted materials are returned to department level to be reviewed again.

4. UP - FA Releases Dossier to President in eFaculty
   - University Committee (URTP)
   - Provost

Retention Cases with Unanimous Positive Reviews at This Point Move Directly to Provost, bypassing URTP.
College
A duly elected college RTP committee of full professors representing college departments shall evaluate and provide statements to help the faculty member maintain or improve professional effectiveness and to explain their recommendations.

The Dean reviews all RTP submissions and makes independent recommendations.

University
A duly elected University Retention, Tenure, and Promotion Committee (URTP) of full professors representing colleges evaluates and dossiers and makes recommendations. URTP reviews all promotion and tenure cases, but among retention cases, it only reviews those with a negative recommendation or vote. Retention cases with only positive recommendations move directly to the Provost for review.

Provost
The Provost reviews all RTP dossiers and makes recommendations for all cases reviewed by URTP. The provost is currently designated by the President to make decisions for uniformly positive retention cases.

President
The reviews all levels of recommendations for cases sent forward by the Provost. The President makes the final decision for retention, tenure, and promotion.

UP - FA generates an RTP calendar each year with deadlines associated with each major moment of retention, tenure, and promotion performance reviews. You may find the calendar at this link: [https://www.sjsu.edu/up/docs/full-deadline-calendar-for-rtp.pdf](https://www.sjsu.edu/up/docs/full-deadline-calendar-for-rtp.pdf).

Part 5. Faculty Activity Reporting in eFaculty: Creating the Dossier

As noted above, San José State University uses eFaculty to assist faculty who are organizing their accomplishments when undergoing evaluations. eFaculty is a personal database and electronic repository—a place to archive information and documents pertaining to all of the aspects of professional academic life, organized into categories corresponding to areas of responsibility for tenure line faculty: teaching, RSCA (research, scholarship, & creative activities) and service.

At SJSU, eFaculty is used for multiple faculty review purposes. For example, departments/schools and colleges capture faculty information for reporting and accreditation purposes, reducing redundancy in activity reporting by department faculty. This section, however, focuses on its functionality for periodic evaluations and performance reviews of faculty.
This section shows how and where to put FAR (or dossier) information into Faculty 180 (F180) in eFaculty. It may be helpful to open the "Activities" section (Figure 4, above) in eFaculty while reading the instructions here. There is also guidance and advice in the tabs in “Activities” once they are clicked on. The tabs in “Activities” were developed for FAR in retention, tenure, and promotion performance evaluations. The tabs are now used to organize faculty accomplishments for all other periodic evaluations and range elevation. The focus here is on the “dossier” as required for RTP, but guidelines for contents of the tabs are the same no matter.

University policies dictated the general content of the RTP dossier, but faculty members are responsible for its preparation. Creating your dossier or FAR is your chance to communicate your strengths and accomplishments. Due to the "ongoing" nature of faculty work, representations of academic careers (such as CVs or dossiers) are always tentative statements--they are always incomplete and subject to change. At best, they reflect who one is as a scholar and educator. Past successes, ongoing work, professional aspirations, and philosophies should be displayed in ways that are digestible by the academic community, and paint a picture of the accomplishments and impact of the scholar or professional.

In all reviews, it is important that the assembled materials in the dossier, including narrative descriptions and uploaded items, provide a clear picture of your overall focus and trajectory. While lecturer evaluators must focus on the type of assignment the faculty member has (e.g., only teaching), everyone is aware that research, professional activities, and service inform teaching and vice versa. Therefore, all faculty should take note that synergy across the three faculty professional responsibilities (Teaching, RSCA, Service) has high value at SJSU; faculty should endeavor to explain how any other projects or experiences may relate to all three dimensions (or the dimension(s) for which they were appointed). Lecturers in particular should feel empowered to provide any professional experiences that have demonstrable impact on the value they take from their profession into the classroom.

For advice on how to frame the dossier content, or what information is most important, please consult with your department chair and/or with the Center for Faculty Development. At UP - FA, we hope that eFaculty helps you to effectively make your case for career advancement. Please do not hesitate to reach out for assistance if you encounter obstacles to presenting your case in the way you would like (at eFaculty@sjsu.edu).

General Dossier Advice and Information

Technical Support
Help with technical issues (not policy or strategy) is readily available. You may direct questions to the Interfolio helpline where the scholars services team will answer questions: PH. 877.997.8807 or help@interfolio.com. You are also invited to reach out to UP - FA using this email address: eFaculty@sjsu.edu.

Training
The Provost’s Office will hold multiple training sessions for faculty in fall semesters. Incidentally, they also hold training sessions for committees and administrators that focus more directly on RTP policies. UP - FA has created several web-based tools to help faculty under review.
Periodically, there are also training sessions via Zoom for faculty candidates and reviewers on how to use eFaculty. Technical training information may be found on the eFaculty training web pages.

**Tips for Entering Activities**

Look through the sub-folders before you begin entering information. eFaculty “Activities” tabs and corresponding dossier “folders” are discussed in the next section of this guide. To make building your case more efficient, you will want to get a big picture understanding of what is required and requested for each folder. Consult that section throughout the dossier preparation period.

**Cloning Entries**

Use the line-item "clone" icon to copy one entry in a tab to use as a template for entering information that is highly similar. For example, if a large number of students were supervised in one semester, one can "clone" the first student's entry, and all that's left is to change the name in the copied version. "Clone" is quite helpful when reporting service.

**Test evidential documents for translation into RPT.**

F180 accepts material in a variety of file types, up to 500 MB in size. The following file formats will be converted to PDF and are viewable in RPT: DOC/DOCX, XLS/XLSX, PPT/PPTX, DOT, ODT, WPD, RTF, TXT, HTML, PDF, TIF, TIFF, PNG, JPG/JPEG, GIF, BMP, and links to web page URLs including links to hosted media files.

By uploading a URL (Figure 6), you can include web pages that will display to reviewers in the document reader. Use YouTube and Vimeo (or other services as added by Interfolio) to include video and audio files. Video/multimedia content is not hosted directly on Interfolio's servers. Instead, YouTube and Vimeo media content are pulled into the RPT reader where reviewers can access them along with all other materials.

Please note that uploaded files are displayed to reviewers using their original file names. To project a professional image, one should not name files with idiosyncratic naming conventions, cavalier titles, or personal references (e.g., “aabx.doc,” “stupid student evals.pdf,” “DeanForcedMeTo.pdf”). To facilitate a fair review, names should reflect the contents of the file and/or the professional area of achievement.
**Figure 6. Selecting URL for Media Files**

If a file type that cannot be displayed in the RPT reader is used, a link will be displayed for the reviewers to the original file in F180. Reviewers may need to download it to their computer to open it. If the original file works in F180, it will work for reviewers upon linking to it. Note: If a file is over 100 MB it will not be converted to display in our reader but will be available as a link.

Files that cannot be displayed in RPT include files with improper extensions (e.g., Word document extension that is misidentified as a .zip file), empty size files of any type, 0-byte files are most commonly .txt or other plain text file types, and PDF issues explained below.

**Convert your files to PDF before uploading.**
Converting your document files to PDF before uploading is helpful because they will be converted to PDF format for review anyway. This gives you more control over how your documents will appear to your reviewers.

Convert image files to PDF before uploading. We recommend collecting images into a single PDF file. This gives more control over how materials appear to reviewers.

When submitting PDFs, be aware that PDF bookmarks can confuse reviewers. Bookmarks are included when materials are displayed to recipients. The RPT reader also displays individual uploaded documents as bookmarks (titled with the title you give them when uploading). To keep things simple, avoid adding bookmarks.

Unfortunately, scrolling text in PDFs does not scroll in the RPT reader (so text is lost). Make sure that scrolling text is all viewable within allotted space, or reformat in ways that allow hidden scrollable text to be displayed in full.
Other problems arise with PDF files, including complex fonts, highly layered contents, extremely large documents, encrypted files (they have password protection), and corrupt or damaged PDF files (they cannot be read by any PDF reader).

When organizing material, more is less. Reviewers must be guided through your material, so you must let them know how each activity or evidence demonstrates your professional effectiveness. Faculty Activities Reporting (FAR) merely warehouses your professional achievements. So put thought into organizing material for review with a goal of reducing the workload of your faculty peers and administrators.

Reviewers will see a somewhat linear presentation of your dossier with review front matter first, followed by “teaching, service, and research.” If information needs to be reviewed in more than one area, add it to each pertinent area. However, one must re-enter that information. It cannot just be moved over by copy and paste in FAR.

Always provide context for achievements. Explain the significance of dossier entries. To do this, provide additional descriptions in text boxes and upload attachments to guide reviewers’ impressions or to add additional context or information to clarify the nature of an activity.

If the item is self-explanatory, there is no need to attach additional documentation unless it is required in the review. Hyperlinks may also be placed in descriptive text boxes. However, committee members are under no obligation to follow those links.

When entering multiple items in a tab in FAR, the “save and add another” button prevents data loss. For example, under “Front Matter” there are multiple documents required. As you add and upload each document, click the Save and Add Another button at the bottom of the screen to prevent having to redo work.

Enter activity dates as semesters and years. One must enter activity timeframes to properly identify activities and materials that are attributable to the period of review. In eFaculty, timeframes are established in terms of semesters (or sessions: winter, spring, summer, and fall) and year. Each activity entry requires one to identify the “Start Semester,” and often requires a concluding, “End Semester.” An entry may start and end in the same semester (e.g., Fall 2019 – Fall 2019). The “semester” information entered here is used by eFaculty to determine what will be exported from F180 (activity input) to RPT (review interface).

Probationary faculty should ensure that they document the entire period of review for their probationary period. Include any service credit years awarded upon being hired. In some cases, credit is given toward promotion to full professor. Unless otherwise documented in the appointment letter, the service period begins on SJSU’s first duty day of the fall semester preceding one’s first fall semester at SJSU by the number of years granted (1 or 2 years only for probationary credit). For example, if appointed in Fall 2015 with 1 year of service credit, the
dossier’s material will start in Fall 2014 and include items from the previous institution in AY 2014-2015 (starting with the first duty day of AY 14-15).

Fill all information fields for activities you enter, and enter information often. It is recommended that faculty regularly enter information/material into eFaculty at any time during the year to keep records for any review up to date. eFaculty can also create CVs, resumes, and biographical sketches at any time from entered information, for use in grant applications, etc. eFaculty will also be used by departments and colleges to complete other kinds of reviews such as RSCA metrics and accreditation. While some information may not be necessary for RTP purposes, it may be necessary for other processes; entering full information now will save effort later.

Check the FAQ and Help Resources. Access the FAQ and eFaculty help pages after logging in to eFaculty. Once in, click on the “Announcements & Help” section in the upper left sidebar under Faculty 180.

Preparing the Dossier for Review - Previewing and Submitting

Next, we turn to the final stages of preparing the dossier, previewing and submitting. This section provides some “how to” tips for end stage preparation for review.

Previewing the Dossier

Faculty are able to preview their dossiers from a reviewer’s perspective at any time. To do so:

1. Click on Vitas and Biosketches (Warning: familiar academic idioms will often carry different meanings in eFaculty. Here, “vita” is a technical term for the Interfolio summary document scraped from FAR, minus attachments.)
2. Select the review type—for RTP “Retention, Tenure, Promotion Dossier.”
3. Select the start (semester of hire OR of service credit at hire OR the last successful promotion) and end dates (Fall 2019) corresponding to your period of review.
4. Click “Refresh Vita”

After an eFaculty administrator has created a case for a review process (i.e., generated a “packet” for review) you will have access to the reviewer’s interface at any time prior to the packet being locked (i.e., submission deadline, dossier closing date).

1. Choose “Your Packs” in the upper left sidebar.
2. Click the link to view the packet. (Figure 7, Image 1)
3. Click “Preview Packet.” (Figure 7, Image 2)
4. Your dossier, complete with attachments pulled in from Faculty180, will be viewable from reviewers’ perspective of the RPT reader.
Upon making changes to the material in FAR, you will need to “regenerate” the “vita” in order to transfer the new material to the RPT reader—it does not update automatically. If your “vita” is marked as “Unlocked,” you should see an option to regenerate the vita. Click “Regenerate.”

Clicking “Regenerate” will open “Regenerate Vita” with information about when the vita was last generated and Vita Name and Term Range (see Figure 8). Any information added or updates to the vita will be reflected in the RPT reader.

Figure 8. Regenerate Interface in eFaculty
existing activities after the date of last regeneration will not be reflected. Clicking “Regenerate” will update that information and any attachments added or removed. After the deadline for review, dossiers will be locked. One cannot update or “Regenerate” the dossier after that date.

**Regenerate and Submit the Dossier**

When you are ready to submit the dossier, go to “Your Packets.” View the packet. Upon viewing the packet, you will click “Packet” or “Edit.” This takes you to the submit page. Click “Expand All” or the “>” icon left of “Faculty180 Vita” (see Figure 9). Select “Regenerate” in the bottom right of the Faculty180 Vita field (under Actions). Finally, click “submit.” Submitting the dossier will lock it, preventing further changes from taking place (unless an administrator unlocks the file).

**Figure 9. Submitting the Dossier**

![Figure 9. Submitting the Dossier](image)

Always “Regenerate” prior to submitting a dossier. Communication about the dossier, and recommendations and the final decision, will arrive in your SJSU email inbox.

The Senior Director, Faculty Affairs in consultation with the Professional Standards Committee produces and maintains a format guide for the dossier. The guide specifies the organizational structure of the dossier, summarizes all required materials, specifies its format, the length and types of appropriate documentation, required statements or narratives by the candidate, and any other required characteristics.

This section of the guide addresses guidelines for RTP, but other users will find it helpful to them if they plan to introduce evidence into other types of reviews. Finding the proper tabs for your evaluation materials helps reviewers understand your accomplishments more readily, and improves their ability to make a fair evaluation.

AY 20-21 is the last year that some faculty members may be reviewed under the standards of the legacy RTP policy, S98-8. This document highlights areas where the legacy policy differs from S15-8. However, it is mostly a reflection of current RTP policies.

Additional Activities Tabs
AY 20-21 saw the first use of eFaculty for all periodic evaluations of faculty, whether tenure line of lecturers. To facilitate that, new tabs were added to the FAR section of F180. These include additional review tabs and tabs for items that were once in the old “RTP Front Matter” section. These are explained in the “Quick Overview of eFaculty” section of this guide. Follow the instructions found in eFaculty after clicking on each tab. RTP users can ignore the first 4 “Review” tabs as they do not apply to RTP performance reviews.

As stated before, with the exception of the first 5 “Review” tabs, all tabs may be used by faculty to store their accomplishments, and to introduce material for any evaluation. Any activities and evidence will be available to reviewers as long as the activities correspond with the “period of review.” If there are no activities associated with the period of review in a tab, the tab title will not be displayed to reviewers at all--is as if that tab were never part of the dossier. Do not feel compelled to add information to a tab unless items there are required for your review.

Tab 1. Review: Retention, Tenure, Promotion - Dossier Front Matter
This section is the first that reviewers will see after the “vita” summary generated by the RPT Reader. Here, candidates place the following required documents in support of performance evaluations.

A recent change in eFaculty “Activities” tabs established standalone tabs for some items previously grouped with front matter as indicated below. If in a prior review, one had all front matter items under the “RTP Dossier Documents (Front Matter)” tab, there is no need to move files out of this tab to the new tabs--the old way is still acceptable. The reviewers will not see
tabs that are left empty, and all items in the first tab will still appear in the order prepared by the candidate.

Items to upload to this tab include:

1. Chair’s Description of Academic Assignment (signed and dated)
2. Tenure-clock stop memos (if applicable)
3. Department RTP Guidelines (if any)
4. Current Dossier Index

Chair’s Description of Academic Assignment
This document should accurately describe your responsibilities over the period of review. It is not an evaluation at all. It conveys your work assignments, expected duties of department faculty, and unique responsibilities. This is where details such as classes taught, assigned time for service, advising load, and so on are delineated. It must be signed and dated by the Chair. (A chair up for promotion should write their own description, but it is strongly advised that they work with their dean’s office to do so.)

Your Chair should provide the description on the due date in the RTP Calendar, typically a few weeks prior to dossier closing. You may write a response if you feel it is not accurate. The information contained in this document will provide an important perspective for reviewers, enabling them to appreciate anything unusual or distinctive about your responsibilities (e.g., that you teach only graduate level courses, or that you have a demanding advising load). The start semester should be reported as the fall semester of the year in which you last submitted a dossier resulting in promotion, or your service credit date or hire date, if you have not previously been promoted. The end semester is the semester the document is given to the candidate.

Tenure Clock Stop Memo (if any)
Faculty are not required to submit information about leaves (e.g., personal, professional) taken during the time under review. If you wish to include information about any leaves taken to provide context for achievements, this information can be included in the narrative statement.

If a leave was accompanied by a “tenure clock stop,” the memo authorizing the tenure clock stop must be uploaded under “Tenure Clock Stop Memo.” The start semester should be reported as the semester when your tenure clock was stopped and the end semester as “ongoing.”

Department RTP Guidelines (if any)
If your department has its own approved RTP guidelines to supplement those adopted by the entire campus, upload those guidelines here. Only valid (current) guidelines may be uploaded. Note that in some cases, candidates may choose between effective guidelines (see S15-7, section 4.4).
Department RTP Guidelines provide important information for the reader about assessing professional emphases and/or accomplishments that may be distinctive to your subject area or department. Only guidelines in effect during the period of review should be placed in this section. The start semester should be reported as the semester that the guidelines were adopted, and the end semester as “ongoing.”

*Current Dossier Index*

Pursuant to Article 15.9 of the CBA, a comprehensive index (item 4) must be prepared by the RTP candidate. The index is an exhaustive list of all items submitted for review during the current period of review. eFaculty can generate an almost complete draft of the index after all material is entered, but the draft lacks entries for attachments or documented evidence that were uploaded.

To create a complete index of the dossier (list of all items including uploaded files/evidence), one may create a complete index from scratch. Alternatively, one may download a copy of the “vita” and edit by inserting the missing attachments.

To create the framework for the index in eFaculty—after you have completely populated the dossier—click on “Vitas and Biosketches” in the F180 sidebar.

1. Choose the “Retention, Tenure, Promotion Dossier” item (Figure 10).
2. Set the date range to correspond with the period of review.
3. Click “Refresh Vita.”
4. Then click “Export/Share,” and select a file type (Word is easier for most).
5. The file will download to your computer for you to edit
6. Add missing information and/or evidence (attachments) to the document. Use titles that are descriptive of the evidence—sometimes file names work. One may insert item descriptions or titles:
   a. Precisely in line with the other related items (e.g., “SOTEs Fall 2019-AAH 114.09” inserted under class, “AAH 114.09, Fall 2019). 
   b. At the end of the section in which they belong (e.g., “Evidence for RSCA: This S-old House manuscript, Farms of Canada, manuscript,” and so forth listed at the end of Research, Scholarship, and Creative Activity (RSCA) tab’s material.
   c. At the end of the “Vita” provided by eFaculty (e.g., “Attachments to the Dossier” with items listed beneath it.

**The final Index should be a comprehensive list of all things submitted for review.** Print the edited dossier index to PDF. Then upload that PDF to the front matter tab. The start semester should be reported as the fall semester the review begins, and the end semester should be the same.
Appointment Letter
Upload a scanned copy of your original appointment letter. This letter documents your assignment as a probationary faculty member at SJSU. If you were ever reassigned to a different unit or division, or your assignment changed, the letter with revisions should be uploaded too.

For the appointment letter, the start semester should be your semester of initial appointment and the end may be “ongoing.” Once set, this tab is static unless your appointment is revised. (For lecturer faculty, the first letter or subsequent revision services as the “appointment letter.” Routine recurring letters do not go here.)

Prior Evaluations and Reviews
Gather evaluations as appropriate. Those conducted in eFaculty may be located there. Any conducted prior to eFaculty’s use should be uploaded. Your dean's office likely has a copy of each; UP - FA has a copy if you cannot locate them in your unit. Upload (a) PDF(s) in reverse chronological order. The start semester should be reported as the semester of the first review and the end semester as the semester of the final review.

Probationary candidates.
Prior evaluations should include (reverse chronological order):

- Annual Evaluation forms, Annual Summary of Achievements, and any responses/rebuttals from prior "mini reviews"
Prior Performance reviews: RTP Forms and/or Promotion Form, Provost's recommendation, Faculty Affairs AVP recommendation (if applicable), Dean's recommendation, College Committee recommendation, Chair's recommendation (if applicable), Department Committee recommendation, responses/rebuttals, Chair's description of academic assignment, curriculum vitae, and dossier index.

Associate seeking promotion.

Prior evaluations should include (reverse chronological order):

- Most recent promotion review and other full reviews since the most recent promotion: RTP Forms and/or Promotion Form, Provost's recommendation, Faculty Affairs AVP recommendation (if applicable), Dean's recommendation, College Committee recommendation, Chair's recommendation (if applicable), Department Committee recommendation, responses/rebuttals, Chair's description of academic assignment, curriculum vitae, and dossier index.

- Post-Tenure Reviews (if applicable).

Candidate's Narrative Statement

The candidate’s statement establishes a vision for the professional career and establishes a framework supporting a case for advancement. This is an “overview” document, not a detailed analysis of activities. Consult with the Center for Faculty Development if you need assistance with this very important document.

Faculty review under S15-8.
Under S15-8, a single narrative statement is specified. The narrative statement should be uploaded here. This provides an opportunity to state the overall case for retention, tenure, or promotion. You may explain your philosophy, agenda, and accomplishments in all three areas of review as well as any areas of overlap or synergy between the three duty areas. (Optional sections are provided for each of the three areas to allow more focused discussion of each.) The narrative is expected to be fewer than 2000 words.

Faculty review under S98-8.
Under S98-8, inclusion of a narrative statement was not specified, and common practice was for candidates to include separate statements for teaching, research, and service. Faculty choosing to be evaluated under S98-8 are not required to provide a narrative, but they may if they like.

You may report the start and end semesters the same as the semester the dossier is submitted.

Tips for the Narrative
Use the narrative statement to support your case by referring to specific documents included elsewhere in the dossier. For example, teaching faculty might explain their teaching philosophies and strategies for achieving student learning, and cite course materials,
evaluations, or assessment data to document their increasing effectiveness as teachers. One may explain trends in teaching metrics.

You could explain your RSCA-related growth by describing continuity or development and progress towards culminating achievements, referring the reader to specific documents. One may detail service activities and responsibilities, explain committee involvement, and link the explanation to specific examples of successfully completed projects.

The narrative can explain how accomplishments in one category supported growth and development in the other two. For example, you should indicate how including students in RSCA benefits student learning and may have provided service to others.

Finally, you may use hyperlinks to external information, but your committee may not examine those links. Unfortunately, one cannot create hyperlinks to files within eFaculty.

**Curriculum Vitae (CV)**
Upload your most current CV. The CV may be in any format that is appropriate to your discipline. However, make sure that the CV:

1. Has a clear, easy to follow format.
2. Includes effective dates for all accomplishments and activities.
3. Details which of your scholarship was peer reviewed.
4. Corresponds with the material in eFaculty, leaving no discrepancies between them (e.g., same order, consistent use of nomenclature).

The start semester should be reported as the semester one is submitting the dossier, and the end semester is the same.

**Academic Assignment or Teaching Effectiveness Narrative**
This section provides the candidate flexibility for enhancing reviewers' understanding of their teaching quality. For example, candidates may add a statement below to frame the material submitted for teaching effectiveness, or provide guidance particular to teaching effectiveness material. This section is not required.

**Classes Taught at SJSU**
This section is prepopulated with classes taught at SJSU using PeopleSoft data. If there is an error, please contact efaculty@sjsu.edu and a correction will be made. Please upload attachments related to your classes, such as syllabi and selected course materials that demonstrate instructional quality and effectiveness under this tab. Note that there are separate tabs for Direct Observations of teaching by peers and classes taught elsewhere.
SOTE/SOLATEs
Student evaluations of teaching (SOTE/SOLATEs) now prepopulate in this section (Spring 2013 - present). When SOTE/SOLATE files do not match classes here, they are stored in the "Additional Student Evaluations" Activities Tab. To obtain missing SOTE/SOLATEs, please contact eFaculty@sjsu.edu. If you note any errors or omissions, please contact UP - FA for assistance with fixing the problem in eFaculty.

If exercising the option to eliminate one class’s SOTE/SOLATE from consideration per F12-6 or S20-4, it is best practice to document the removal of the evaluation citing the policy. Statements are provided in section, SOTE/SOLATEs During the Review Period, under the Quick Overview of eFaculty in this guide. One cannot partially remove student evaluations (e.g., only the quantitative section).

Per S20-4, faculty may choose to exclude any or all student evaluations during Spring 2020. Per F12-6, the survey results from one class per qualifying year from their evaluations. For a year to qualify, faculty must have taught at least fifteen WTUs evaluated via the SOTE and/or SOLATE instrument during that review year. The “review year” shall correspond to the review cycle of the faculty member. The review cycle is typically the academic year (AY), but lecturer faculty annual evaluations are on the calendar year. When removing student evaluations, keep in mind the requirement that remaining SOTE/SOLATEs shall be representative of teaching assignments.

Syllabi
During the period under review, include ONE syllabus for each course taught (but not for each time the course was taught).

Teaching Materials
A limited sample of course materials, such as handouts or exams, are appropriate for inclusion. If you have authored and self-published a textbook, you may include a colleague’s evaluation of the textbook, but the textbook itself is not required.

It is helpful if the materials align with the themes highlighted in the narrative statement. Material illustrating the basis for and outcome of a significant redesign of a course would be appropriate here. The more material supporting your engagement with teaching, the more you can help reviewers avoid overreliance on student evaluations of teaching.

Classes Taught at Other Institutions
Use this tab to add information about courses taught at institutions other than SJSU. You may add example course materials, such as a syllabus or assignment, as attachments. Student and peer evaluations (equivalent to direct observations at SJSU) of the course should be added here.
If you received service credit when you were hired at SJSU, you are required to include teaching, service, and RSCA from those years. In this section you will provide readers with information about the courses you taught during those service years. For each class you taught, report the name of the course, upload the syllabus and a sample of teaching materials (if desired). Do not forget to upload student and peer evaluations of these courses too.

Additional Student Evaluations
This tab is for documenting teaching effectiveness, through SOTEs, SOLATEs, and other University instruments that were not uploaded in "Classes Taught at SJSU." This is also the "spillover" tab for SOTE/SOLATEs for which classes you taught cannot be found but your dossier can be. You may make comments to explain placement or understanding of evaluations under this tab.

Direct Observations of Teaching
Upload all Direct Observations (peer evaluations) of teaching in this tab. Include officially submitted response/rebuttals with the associated Direct Observations.

According to F12-6, one Direct Observation per year is required for probationary faculty. For candidates seeking promotion to Full Professor, direct observations in at least 2 different courses during the period of review are required. Minimum requirements for frequency of Direct Observations may differ, departments may require more than the number stated here.

Other Evaluations of Teaching Effectiveness
In this tab, you can provide other indicators or assessments of your success as a teacher, such as student success in post-graduate activities. Signed student letters are generally not useful unless they are quite specific and comprehensive in their evaluation of your teaching. Teaching awards should be entered under "Honors and Awards."

Pursuant to F12-6 and CBA (15.17b), any student communications or evaluations provided outside of the regular evaluation process must be identified by name to be included here. There are additional prohibitions in F12-6. Also excluded are student opinions published separately (e.g., "Rate My Professor"), unofficial surveys (e.g., formative feedback), or additional questions collected with the SOTE/SOLATE survey.

Assigned Time (e.g., Graduate Coordinator, RSCA, "Buyouts")
In this section, detail any assigned time and course reductions you may have received for a given semester. Please enter as the hours equivalent to your semester fraction release time. Use the following formula to convert semester fractions (e.g., .2, .4) to equivalent hours: (semester fraction x 15 = hours). For example (.1 release x 15 = 1.5 hours, .2 release time x 15 = 3 hours, etc.). Then enter the number of hours in the data box that says
"Reassigned Load Hours." Reassigned load hours is equal to our term, WTUs. If you know the WTUs of your assignment, just enter that number.

**Other Academic Assignment**
This section is primarily for Librarians and Counselors since their academic assignment does not typically include teaching regularly scheduled classes. But any faculty member may use this section to list other areas of their academic assignment that do not fit neatly into the other categories. (For example, department chairs might want to use this section to describe their administrative academic assignment.) This is also the place where overload may be reported.

**Service Narrative**
This tab provides the candidate flexibility for enhancing reviewers' understanding of their service activities. The candidate may want to explain their service agenda or help reviewers understand the depth or scope of their involvement in a way not possible below. This section is not required.

**Committee Service to University Divisions**
Report the department/school, college, and university committees on which you have served. Extensive documentation and outside evaluation are not required, but reviewers should be provided enough information to judge your contributions; in some cases, these things may help. Descriptions of a Committee’s charge and scope, your leadership and/or role on a committee, and significant accomplishments are permitted (and encouraged when the committee’s work is nonroutine).

eFaculty has been pre-loaded with existing university- and college-level committees (e.g., RTP, curriculum, etc.). The default committee level is "university." Click on "Change" to select a different unit (see Figure 11). If the committee you served on is not listed, select “0ther” and type in the name of the committee.

For each committee, you are asked to provide the name of the committee, the semesters of your service, and your role on the committee. Please attach documents that briefly explain the charge of the committee, and describe your contributions. Evaluations of your service on committees may be uploaded here too.

**University Service Not on Committees**
Service at SJSU other than committee work should be reported and described here. Descriptions of professionally meaningful activities, including social impact, leadership, and significant accomplishments are permitted (and encouraged when significance of involvement
Figure 11. Entering University Committee Service

Activity Input

Committee Service to University Divisions

Report the department/school, college, and university committees on which you have served. Descriptions of Committee’s charge and scope, leadership and/or role on committee would not be obvious to reviewers). Examples: participation in campus organizations and clubs such as advising a student club or student competition; leading orientation sessions; performing administrative responsibilities that are not part of primary academic assignment.

Academic Advising

Provide information pertaining to the work you do as an academic advisor. Fill in the boxes with the approximate number of students you advise each semester at each level. If you have received assigned time for advising, you would also report that assigned time under “Assigned Time (e.g. Graduate Coordinator, RSCA, “Buyouts”).”

This is not intended to be the place to record theses you are advising, or student projects that you are advising. Those activities should be included in the next tab called "Student Supervision."
Note: Academic advising is handled very differently from one department to another. Not all faculty have academic advising responsibilities. If this category doesn’t reflect what your assignment is, you don’t have to complete it. Ask your chair to explain your department’s academic advising in your “Chair’s Description.”

**Student Supervision**
Summarize the work you do supervising master's theses, doctoral dissertations, and other major projects (e.g., Bachelor of Fine Arts shows). In some departments, this might be where you list supervised internships or clinical supervision. Do not list students by name for courses captured in “Teaching Assignments” unless collaboration produced extraordinary professional accomplishment.

**Service to the Community**
In this tab, list your activities in the community that draw upon your professional expertise. This might include a chemistry professor judging a high school science fair; or a music professor teaching music appreciation at the Osher Lifelong Learning Institute. Provide enough information for reviewers to assess the importance and impact your activities have on those affected.

According to S98-8, service to other associations and to the community, state, nation, or international community in a capacity related to the faculty member's discipline and requiring the application of the faculty member's professional knowledge or skills shall also be recognized as a professional contribution or achievement.

According to S15-8, participation in public interest groups sponsored by or affiliated with the University and service that you perform as a representative of SJSU should be included here.

**Service to the Profession/Discipline**
This tab documents your service to your academic, disciplinary, or professional organizations. This includes activities such as organizing panels, serving as a reviewer of grant proposals, or serving on an editorial board. You should identify the organization by its full name (no acronyms) so that reviewers from outside your discipline can understand the nature of your service.

**Membership in Professional Organizations**
List the professional or disciplinary organizations to which you belong. To aid reviewers from outside your discipline, you should identify organizations by their full names rather than by abbreviations or acronyms.
RSCA Narrative
The section provides the candidate flexibility for enhancing reviewers’ understanding of their research, scholarship, and/or creative activities. For example, the candidate may include a statement framing their RSCA agenda, or add insight into the reach and/or magnitude of their RSCA’s impact on others that may not be reflected elsewhere. The section is not required.

Research, Scholarship, and Creative Activity (RSCA)
In this tab, provide information about research, scholarship, and creative activities. If items were peer reviewed, mark as such in a consistent manner. Student collaborators should be made identifiable, perhaps with an asterisk (or some other consistently used symbol) and a note saying it signifies a student co-author.

In this tab, you can enter the following, among other things:

- Books
- Case Studies
- Chapters / Monographs
- Creative Performance
- Creative Production
- Electronic Media
- Journal Publication
- Patents
- Poster Presentations
- Presentations
- Proceedings Publication
- Reviews
- Software/Hardware
- Technical Report / Whitepaper
- Works of Journalism
- Other

There are not separate sections for different kinds of RSCA. Instead, as you input or upload RSCA, you will be asked to provide additional information about each activity, such as:

- Status (e.g., published, forthcoming, in progress)
- Publication/Production outlet (e.g., name of journal, conference, publisher)
- Co-authors (their contributions and their status—student?)
- Publication date
- Whether it was peer reviewed or not—THIS IS VERY IMPORTANT TO IDENTIFY
- Type of review (e.g., anonymous, juried)

Whenever possible, listed works should be uploaded as attachments, organized by type (e.g., peer reviewed), in a reasonable order, with full Information. If appropriate, upload the document itself. Translations of non-English publications should be provided. For other work, provide other
representation of the work (e.g., photograph of item, mpeg or mp3 file, or url for the item). You should provide a description of the work in a text box.

Citations can be imported into F180 in RIS or BibTeX format. For example, citations can be exported from Google Scholar in BibTeX format and then imported into FACULTY180. Once the citations have been exported, log in to F180 and follow the steps below.

Figure 12. Importing Citations into Faculty Activity Reporting

Navigate to the Activity Input form using one of the following methods:

- Click the Activities link in the menu.
- Click the Action item in the To Do section, if the link is displayed there.
- Click the Activities link in the Manage Your Data section.

Then:

1. The Activities form displays. If the Scholarly Activities section is not already open, scroll down to the section and click the expand icon to expand the section.
2. Click the Add button.
3. The Activity Input screen displays. Click the Generic (RIS / BibTeX) import option. Note: Click the Help Videos link to view tutorials on importing citations into F180.
4. Click the Continue button.

1. Select the citation format BibTeX.
2. Click Choose File and browse to the location of the saved citations. Select the citation file.
3. Click Save.
1. The citations from the file are listed. Select the citations to import. The check box in the heading row can be used to select or unselect all citations.
2. After reviewing all of the relevant information, click Import Selected.

![Image of citation import interface]

**Grants**
Provide information about grants you have authored or co-authored. This may include grant proposals that are in progress, under review, funded, and also grants that have been denied.

Provide information about the project itself, the nature of the funding agency, the nature of the review, amounts of the award, and your role in the project as well as the role of collaborators, if any.

Unfortunately, information entered into the abstract in Section A will not appear in the summary document generated for reviewers. You should provide a copy of the grant proposal as well as any contextual information that may help the reviewers.

**Honors and Awards**
This section can be used to record both internal and external honors and awards you have received. These might include any sort of formal recognition you receive pertaining to your teaching, your scholarly or creative work, or to your contributions to your professional community.

The start and end semesters for each item may be the same semester.

**Professional Development**
Use this tab to list any professional development sessions or opportunities you have undertaken. This might include pedagogy workshops, faculty learning communities, certificate programs, activities to develop your RSCA-related skills, and so on. Such activities may include ones sponsored by SJSU or by other entities or organizations. Explain the impact the opportunity had on your career.
Professional Employment
In this tab, document professional employment you may have outside the University that is based on your academic or professional expertise. Upload attachments if you feel that would help the reader better appreciate the nature and scope of your contributions.

For each entry, a text box is provided for describing your contribution. It is not appropriate to list grant employment already described in one of your "RSCA" activities (e.g., serving as project PI or Co-PI). Note: This feature is most relevant for part-time, temporary faculty undergoing review.

Consulting
Consulting work that you do outside the University that is based on your academic or professional expertise goes in this section. If such items have been entered elsewhere, consider moving them here. You should explain how this dimension of your work is distinct from others.

External Career Reviews
This section provides the candidate an area to add comprehensive or holistic evaluations of their academic career by external reviewers. Only include items that cannot or did not appear in other sections of the dossier and do not exceed the guidelines of this review. Any conflict of interest or personal ties with external reviewers must be disclosed.

It is recommended that faculty who wish to have external reviews work with their chair or dean’s office to create a list of appropriate external reviewers from whom reviews would be solicited. This section is not required.

Part 7. Policy Matters

S98-8, Legacy RTP Policy Phaseout
When SJSU modernized its policies covering periodic evaluation for probationary faculty and performance review for retention, tenure, and promotion, there was a legacy policy, S98-8, grandfathered in for faculty who didn’t want to switch. Faculty appointed to their tenure-track position during fall 2016 were the last cohort allowed to use S98-8. All subsequently hired faculty were placed under University Policy S15-8.

Faculty who began their tenure-track position prior to fall 2016 have the option of being reviewed under S15-8 (the "updated" policy) or of being reviewed under S98-8 (the "legacy" policy). However, at each review period, faculty who are under S98-8 are given the opportunity to switch to S15-8. After AY 20-21, the campus will no longer evaluate anyone under S98-8.

Anyone already reviewed under S15-8 must remain under that policy. Anyone wishing to switch to S15-8 from S98-8 must notify UP - FA about the switch prior to the dossier closing date.
S15-8
Faculty are evaluated on 3 areas of professional responsibility under S15-8. Reviewers compare the faculty member’s career with descriptors on a rubric for each of the 3 areas. For tenure and promotion, committees make recommendations by voting for which of 4 descriptors most represents the faculty member’s accomplishments in that professional area. Administrators select a level to their recommendation.

On committees, the majority vote is the level recommended by the committee for that area. See Figure 13 for how to count votes in S15-8. A majority at SJSU must always be greater than 50%—a tie does not constitute a majority affirmation. The level with majority consensus in each area is reported independently.

Figure 13. Counting Votes on Rubrics Under S15-8

The pattern of accomplishments across the 3 professional areas of responsibility determines the recommendation for advancement by committees and administrators. A written report explains why the level in each area was selected.

Note: Committees and administrators do not recommend levels on the rubrics for retention cases. They only make a recommendation to retain or not. Retention evaluations inform candidates about their progress toward promotion and/or tenure in the 3 professional areas, thus justifying their overall recommendation.

As all candidates’ dossiers are rated on the same rubrics, regardless of their current rank or status, the standards for promotion to full professor are stricter than the standards for promotion
and/or tenure of probationary faculty. The standards expected for early advancement are also stricter. Unsatisfactory performance in any area will prevent advancement. The standards required for promotion and/or tenure are below.

Standards for Promotion and/or Tenure

Promotion to Associate/Tenure
A. Excellent in either teaching or scholarship and at least Baseline in the other 2
OR
B. Good in any 2 categories and at least Baseline in the 3rd

Early Promotion to Associate/Tenure
Excellent in 2 categories and at least Baseline in the 3rd

Promotion to Full Professor
A. Excellent in 2 categories and at least Baseline in the 3rd
OR
B. Excellent in 1 category and at least Good in the other 2

Early Promotion to Full Professor
Excellent in 2 categories and at least Good in the 3rd

Rubrics for Three Areas of Professional Responsibility
The rest of this section contains the rubrics for each of the 3 areas of professional responsibility.

Academic Assignment Or Teaching Rubric
Librarians and counselors have departmental guidelines with their own rubric in this area. The following apply only to teaching faculty.

Unsatisfactory Teaching
The candidate has not documented teaching accomplishments that meet the baseline level as described below.

Baseline Teaching
The candidate has documented effectiveness in teaching, particularly for classes within the candidate’s primary focus and any curriculum specifically identified in the appointment letter. Assigned courses are well crafted and appropriate for the catalog description, as shown in course syllabi and other teaching materials. The candidate has taken measures to correct any problems identified earlier in either direct observations or prior performance evaluations. Recent direct observations and surveys of student opinion of teaching effectiveness (SOTEs) are also supportive. SOTEs are considered supportive if they are either within appropriate norms, or if a preponderance of student opinion from objective and subjective questions indicates effective teaching.
Good Teaching
In addition to the baseline as described above, the candidate has documented a degree of innovation within the teaching assignment. This could mean that the candidate has effectively taught an unusually wide range of courses, or that the candidate has created one or more new courses to fill important curricular needs, or that the candidate has documented the use of high-impact practices in teaching. Candidates meeting this level of achievement have at least some student evaluations above the norms, when taken in context of the nature, subject, and level of classes taught.

Excellent Teaching
In addition to a good performance as described above, the candidate has either engaged in a higher level of curricular innovation than described above, or documented widespread positive impacts for student success, or achieved both student and peer evaluations that are consistently above the norms when taken in context of the nature, subject, and level of classes taught. Excellent teachers may have received recognition or awards for their teaching, they may have mentored other teachers, or they may have created curriculum that is adopted at other institutions.

Service Rubric

Unsatisfactory Service
The candidate has not documented service activities that meet the baseline level described below.

Baseline Service
The candidate has undertaken a fair share of the workload required to keep the Department functioning well. This includes activities such as work on department committees, the creation or revision of curricula, the assessment of student learning outcomes, or participating in department planning, accreditation, outreach, and advising. A baseline level of achievement for promotion to Professor will also include at least some service at the University level.

Good Service
In addition to the baseline described above, the candidate has also participated in significant service activities beyond the department. This will usually include college-level service and may include University level service, service in the community, or significant activities in a professional organization. In at least one facet of service, the candidate will have demonstrated leadership resulting in tangible, documented achievements.

Excellent Service
In addition to a good performance as described above, the candidate has documented significant influence at a high level, whether it be service to students, the University, the community, or the profession. Candidates who achieve an evaluation of “excellent” in service will generally have occupied several elected or appointed positions of leadership and will
document multiple specific accomplishments that have significance for people beyond the candidate’s department or college.

Research, Scholarship, And Creative Activity Rubric

Unsatisfactory RSCA
The candidate has not created scholarly, artistic, or professional accomplishments that meet the baseline level as described below.

Baseline RSCA
The candidate has, over the course of the period of review, created a body of completed scholarly, artistic, or professional achievements and shows the promise of continued growth and success within his/her discipline.

Good RSCA
In addition to the baseline as described above, the candidate has created scholarly, artistic, or professional achievements that constitute important contributions to the discipline and that help to enhance the scholarly, artistic, or professional reputation of the candidate’s department, school, college, SJSU, or the CSU more generally.

Excellent RSCA
In addition to a good performance as described above, this level requires achievements of both sufficient quality and quantity to establish a significant, important, and growing reputation within the candidate’s field. Excellence in scholarly, artistic, or professional achievement requires a body of work that is recognized as significant within the discipline.