POLICY & PROCEDURES CHECKLIST FOR PORTFOLIO EVALUATION

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

Candidate’s Name: ____________________________________________

<table>
<thead>
<tr>
<th>Evaluator’s Signature</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department/Unit PTE Committee Chair</td>
<td>Signature: _____________________________ Date: _____________</td>
</tr>
<tr>
<td>Department/Unit PTE Chair or Head</td>
<td>Signature: _____________________________ Date: _____________</td>
</tr>
<tr>
<td>Chair College PTE Committee</td>
<td>Signature: _____________________________ Date: _____________</td>
</tr>
<tr>
<td>Dean of the College</td>
<td>Signature: _____________________________ Date: _____________</td>
</tr>
<tr>
<td>Other (e.g. Extension)</td>
<td>Signature: _____________________________ Date: _____________</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Department Level Evaluation</th>
<th>PTE-Committee</th>
<th>Chair</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solicitation of letters of review followed University's recommended model.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>In case of joint appointments, input from other units was requested and included.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Members were elected according to department's PTE standards.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Potential conflict of interest situations were identified/mitigated.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>No faculty member being considered for promotion served on PTE committee.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>No administrators, as identified by Policy 352, served on PTE committee</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Departmental voting procedures on applicant's candidacy were followed.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>The evaluation was based on the written standards and criteria of the department.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Candidate received letter of evaluation/recommendation by due date.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Candidate was accorded 14 calendar days to respond.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Department specific procedures were followed.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Committee deliberations were kept confidential.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>The department PTE document is consistent with Policy 352 and College PTE guidelines.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Portfolio was submitted to the college level by the due date.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>College Level Evaluation</th>
<th>PTE-Committee</th>
<th>Chair</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members were elected according to College PTE document.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>No administrators, as identified by Policy 352, served on the College Committee.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Potential conflict of interest was identified/mitigated.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>No faculty member being considered for promotion served on PTE committee</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Information added conformed to materials listed in Policy 352, section 6.2.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>College and Dean reviews were conducted separately and independently of each other.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Evaluation was based on the written standards and criteria of the department and the college.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Candidate received copy of letter of evaluation/recommendation by due date.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Committee deliberations were kept confidential.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>The College's PTE document is consistent with Policy 352.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Portfolio was submitted to Provost by the due date.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
<tr>
<td>Candidate received copy of the completed policy &amp; procedures checklist.</td>
<td>□ Yes □ N/A □ Yes □ N/A</td>
<td></td>
</tr>
</tbody>
</table>

Report Generated on [Report Run Date]
DEMOGRAPHIC DATA:
Name: 
Rank: 
Department: 
College: 

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

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

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

Signature __________________________ Date ________________

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

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

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

COMMENTS: ________________________

ADMINISTRATORS RESPONSIBLE FOR PORTFOLIO REVIEW:

<table>
<thead>
<tr>
<th>ROUTING</th>
<th>ADDED MATERIALS INVENTORY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portfolio Received:</td>
<td>Materials Added:</td>
</tr>
<tr>
<td>Dept. PTE Committee</td>
<td>Date:</td>
</tr>
<tr>
<td>Dept. Chair</td>
<td>By:</td>
</tr>
<tr>
<td>College PTE Committee</td>
<td></td>
</tr>
<tr>
<td>College Dean</td>
<td></td>
</tr>
<tr>
<td>Director</td>
<td></td>
</tr>
<tr>
<td>Provost</td>
<td></td>
</tr>
<tr>
<td>President</td>
<td></td>
</tr>
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</table>

VOTE TALLY

<table>
<thead>
<tr>
<th>Number of Votes for:</th>
<th>Tenure*</th>
<th>Promotion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept. PTE Committee</td>
<td>Recommend</td>
<td>Deny</td>
</tr>
<tr>
<td>Dept. Chair</td>
<td></td>
<td></td>
</tr>
<tr>
<td>College PTE Committee</td>
<td></td>
<td></td>
</tr>
<tr>
<td>College Dean</td>
<td></td>
<td></td>
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<tr>
<td>Director</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provost</td>
<td></td>
<td></td>
</tr>
<tr>
<td>President</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

Department/Unit Signature __________________________ Dean Signature __________________________
## Promotion and Tenure Portfolio

### Part I

[Report Start Date] - [Report End Date]

[{LAST NAME}, {FIRST NAME} {MIDDLE NAME}]

### C. Appointment Letter and Position Description / Special Agreements

<table>
<thead>
<tr>
<th>Screen: Promotion and Tenure (first record) &gt; &lt;strong&gt;Comments for Promotion and Tenure Report by Section&lt;/strong&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items: All rows</td>
</tr>
<tr>
<td>Criteria:</td>
</tr>
<tr>
<td>1. Section is equal to &quot;C. Appointment Letter and Position Description / Special Agreements&quot;</td>
</tr>
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</table>

[Comment for Section]

#### C.1 Letter of Appointment

<table>
<thead>
<tr>
<th>Screen: Permanent Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items: All records</td>
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</tbody>
</table>

#### C.2 NDSU Job Descriptions

<table>
<thead>
<tr>
<th>Screen: Academic, Government, Military and Professional Positions</th>
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</thead>
<tbody>
<tr>
<td>Items: All records</td>
</tr>
<tr>
<td>Criteria:</td>
</tr>
<tr>
<td>1. Organization contains one of the substrings: &quot;NDSU&quot;, &quot;North Dakota State&quot;</td>
</tr>
</tbody>
</table>

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

[Brief Description]

<table>
<thead>
<tr>
<th>Screen: Promotion and Tenure (first record) &gt; &lt;strong&gt;Files for Promotion and Tenure Report by Section&lt;/strong&gt;</th>
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</thead>
<tbody>
<tr>
<td>Items: All rows</td>
</tr>
<tr>
<td>Criteria:</td>
</tr>
<tr>
<td>1. Section is equal to &quot;C.2 NDSU Job Descriptions&quot;</td>
</tr>
</tbody>
</table>

[Comment for Section]

#### C.3 Administrative Assignments

<table>
<thead>
<tr>
<th>Screen: Administrative Assignments</th>
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</thead>
<tbody>
<tr>
<td>Items: All records</td>
</tr>
</tbody>
</table>

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

[Responsibilities/Brief Description], [Responsibilities/Brief Description]

[Accomplishments/Progress of Goals], [Accomplishments/Progress of Goals]

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

<table>
<thead>
<tr>
<th>Screen: Permanent Data &gt; Rank</th>
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</thead>
<tbody>
<tr>
<td>Items: All rows</td>
</tr>
</tbody>
</table>

Service Agreement

<table>
<thead>
<tr>
<th>Screen: Promotion and Tenure (first record) &gt; &lt;strong&gt;Comments for Promotion and Tenure Report by Section&lt;/strong&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items: All rows</td>
</tr>
</tbody>
</table>

Field Code Changed

Field Code Changed

Field Code Changed

Commented [AR2]: Populate “Responsibilities/Brief Description” and “Accomplishments/Progress of Goals” title
C.5 Previous Tenure/Promotion Consideration (if applicable)

Screen: Permanent Data > Rank
Items: All rows

Tenure/Promotion Consideration

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

D. Academic Background

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

D.1 Degrees

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

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

Disquisition Title: [Dissertation/Thesis Title]

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

D.2 Post-Doctoral / Additional Experience

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

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

Disquisition Title: [Dissertation/Thesis Title]

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

D.3 Licensures and Certifications

Screen: Licensures and Certifications
Items: All records

[Title of Licensure/Certification], [Sponsoring Organization], [State]. ([Month Obtained Day Obtained, Year Obtained - Expiration Month Expiration Day, Expiration Year]).
**Promotion and Tenure (first record)**

**Comments for Promotion and Tenure Report by Section**

**Items:** All rows

**Criteria:**

1. Section is equal to "D.3 Licensures and Certifications"

**E. Academic Experience / Employment History**

**Screen:** Academic, Government, Military and Professional Positions

**Items:** All records

**Criteria:**

1. Section is equal to "E. Academic Experience/Employment History"

**F. Statement of Context and Accomplishment**

**Screen:** Promotion and Tenure (first record)

**Comments for Promotion and Tenure Report by Section**

**Items:** All rows

**Criteria:**

1. Section is equal to "F. Statement of Context and Accomplishment"

**G. Teaching, Advising, and Curriculum Development**

**Screen:** Promotion and Tenure (first record)

**Comments for Promotion and Tenure Report by Section**

**Items:** All rows

**Criteria:**

1. Section is equal to "G. Teaching, Advising, and Curriculum Development"

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

**Screen:** Scheduled Teaching

**Items:** All records

<table>
<thead>
<tr>
<th>Term [Year]</th>
<th>Course Prefix</th>
<th>Course Number</th>
<th>Section Number</th>
<th>Course Name</th>
<th>Credits</th>
<th>Enrollment</th>
<th>% Resp.</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
<th>Q5</th>
<th>Q6</th>
</tr>
</thead>
</table>

**Screen:** Promotion and Tenure (first record)

**Comments for Promotion and Tenure Report by Section**

**Items:** All rows

**Criteria:**

1. Section is equal to "G.1 Courses Taught at NDSU and Student Ratings of Instruction"

**G.2 SROI Open Ended Comments**

**Screen:** Scheduled Teaching

**Items:** All records

**Criteria:**

1. SROI Open Ended Comments has a value
G.24 Quality of Teaching (Administration and Peer Evaluation)

**a. Statement by Department Chair or Appropriate Unit Head**

**b. Statement by Peers**

G.43 Curriculum Development

**a. Contributions in Curriculum Development**

[Describe any pedagogical innovations that you introduced into this course (e.g., international issues, computer applications, ethical analysis, new classroom techniques, etc.). Describe any new teaching material (e.g., cases, videotapes, audiotapes, course modules, instructor manuals, test banks, or simulations) that you developed and/or implemented. Describe any activities in your course that enhanced student learning and/or student contact with the community (e.g., guest speaker, outside projects, field trips, field projects, etc.)]
b. Educational Committees and Activities

| Screen: Department | Items: All records | Criteria:  
1. Purpose is equal to "Teaching" |
| Screen: College | Items: All records | Criteria:  
1. Purpose is equal to "Teaching" |
| Screen: University | Items: All records | Criteria:  
1. Purpose is equal to "Teaching" |
| Screen: Professional | Items: All records | Criteria:  
1. Purpose is equal to "Teaching" |
| Screen: Public | Items: All records | Criteria:  
1. Purpose is equal to "Teaching" |

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

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

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

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

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

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

[Comment for Section]

G.3b Academic Advising

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

[Comment for Section]

a. Description of Academic and Co-Curricular Advising

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

[Comment for Section]

b. Formal Undergraduate Advising

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

Report Generated on [Report Run Date] 8
### Promoted Tenure (first record) > Comments for Promotion and Tenure Report by Section

<table>
<thead>
<tr>
<th># Advised</th>
<th>First record</th>
<th>Second record</th>
<th>Third record</th>
<th>Fourth record</th>
<th>Fifth record</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Number of Undergraduate Students Advised]</td>
<td>[Academic Year]</td>
<td>[Academic Year]</td>
<td>[Academic Year]</td>
<td>[Academic Year]</td>
<td>[Academic Year]</td>
</tr>
</tbody>
</table>

#### c. Student Rating of Advising

**Screen:** Promotion and Tenure (first record) > Comments for Promotion and Tenure Report by Section

**Items:** All rows

**Criteria:**
1. Section is equal to "G.4b Formal Undergraduate Advising"

[Comment for Section]

#### d. Co-curricular Advising

**Screen:** Directed Student Learning (e.g., theses, dissertations)

**Items:** All records

**Criteria:**
1. Involvement Type is equal to "Student Organization Advisor"

2. Semester Completed has a value

3. Graduation Semester has a value

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

<table>
<thead>
<tr>
<th>Organization</th>
<th>Semester Started</th>
<th>[Semester Started Term]</th>
<th>[Semester Started Year]</th>
<th>[Stage of Completion]</th>
<th>[Semester Completed Term]</th>
<th>[Semester Completed Year]</th>
<th>Advised: [list of [Student First Name] [Student Last Name] [Student Degree] [Program]]</th>
<th>Completed: [Semester Completed Term] [Semester Completed Year]</th>
<th>Expected [Graduation Semester] [Graduation Semester Term]</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Comments]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Screen:** Promotion and Tenure (first record) > Comments for Promotion and Tenure Report by Section

**Items:** All rows

1. Section is equal to "G.4d Co-curricular Advising"

[Comment for Section]

#### e. Undergraduate Student Researchers Mentored

**Screen:** Directed Student Learning (e.g., theses, dissertations)

**Items:** All records

**Criteria:**
1. Involvement Type is equal to "Undergraduate Research Advisor"

2. Semester Completed has a value

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

<table>
<thead>
<tr>
<th>Organization</th>
<th>Semester Started</th>
<th>[Semester Started Term]</th>
<th>[Semester Started Year]</th>
<th>[Stage of Completion]</th>
<th>[Semester Completed Term]</th>
<th>[Semester Completed Year]</th>
<th>Advised: [list of [Student First Name] [Student Last Name] [Student Degree] [Program]]</th>
<th>Completed: [Semester Completed Term] [Semester Completed Year]</th>
<th>Expected [Graduation Semester] [Graduation Semester Term]</th>
</tr>
</thead>
<tbody>
<tr>
<td>[Comments]</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Screen:** Promotion and Tenure (first record) > Comments for Promotion and Tenure Report by Section

**Items:** All rows

1. Section is equal to "G.4d Co-curricular Advising"

[Comment for Section]
### Criteria:

1. **Section** is equal to "G.4e Undergraduate Student Researchers Mentored"

### K-12 Students Mentored

#### Screen: Directed Student Learning (e.g., theses, dissertations)

Items: All records

Criteria (is one of):
1. **Involvement Type** is equal to "K-12 Mentor"
2. **Semester Completed** has a value
3. **Graduation Semester** has a value

#### Commentary:

- **K-12 Mentor**
  - Completed: Fall 2016
  - Completed: Spring 2017
  - Completed: Summer 2017
  - Expected Graduation: Fall 2017
  - Expected Graduation Spring 2018
  - Expected Graduation Summer 2018

### Graduate Student Advising

#### Screen: Promotion and Tenure (first record) > Comments for Promotion and Tenure Report by Section/Strong

Items: All rows

Criteria:
1. **Section** is equal to "G.4f K-12 Students Mentored"

### As Major Professor

#### Screen: Directed Student Learning (e.g., theses, dissertations)

Items: All records

Criteria (is one of):
1. **Involvement Type** is one of: "Master's Thesis Committee Chair", "Dissertation Committee Chair"
2. **Semester Completed** has a value
3. **Graduation Semester** has a value

### As Examining Committee Member

#### Screen: Directed Student Learning (e.g., theses, dissertations)

Items: All records

Criteria (is one of):
1. **Involvement Type** is one of: "Master's Thesis Committee Member", "Dissertation Committee Member", "Master's Advisor"
2. **Semester Completed** has a value
3. **Graduation Semester** has a value

### Formatted: Font: Bold

- **Commented [AR7]:** Add "Involvement Type or Explanation of Other" as subheading
- Sort records chronological order if criteria is one of: "Completed Semester", "Graduation Semester" (see example below)

---

**Commented [AR7]:** Add "Involvement Type or Explanation of Other" as subheading

Sort records chronological order if criteria is one of: "Completed Semester", "Graduation Semester" (see example below)
c. Postdoctoral Trainees

Screen: Directed Student Learning (e.g., theses, dissertations)
Items: All records
Criteria: (is one of):
1. Involvement Type is one of: "Postdoc Supervision", "Internship Advisor", "Supervised Research", "Supervised Teaching Activity", "Other"
2. Semester Completed has a value
3. Graduation Semester has a value

<table>
<thead>
<tr>
<th>Involvement Type</th>
<th>Organization</th>
<th>Semester Started</th>
<th>Semester Started Term</th>
<th>Semester Started Year</th>
<th>Stage of Completion</th>
<th>Semester Completed Term</th>
<th>Semester Completed Year</th>
<th>Expected Graduation Semester</th>
<th>Graduation Semester Year</th>
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<th>Comments</th>
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</table>

d. Other Trainees

Screen: Directed Student Learning (e.g., theses, dissertations)
Items: All records
Criteria: (is one of):
1. Involvement Type is one of: "Undergraduate Honors Thesis", "Undergraduate Capstone Project Advisor", "Internship Supervisor", "Supervised Research", "Supervised Teaching Activity", "Other"
2. Semester Completed has a value
3. Graduation Semester has a value

<table>
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<tr>
<th>Involvement Type</th>
<th>Organization</th>
<th>Semester Started</th>
<th>Semester Started Term</th>
<th>Semester Started Year</th>
<th>Stage of Completion</th>
<th>Semester Completed Term</th>
<th>Semester Completed Year</th>
<th>Expected Graduation Semester</th>
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<th>Comments</th>
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</table>

G.6 Outreach Activities

Screen: Non-Credit Instruction Taught
Items: All records
Criteria: Consulting Type is equal to "Academic"

<table>
<thead>
<tr>
<th>Consulting Type</th>
<th>Organization</th>
<th>Semester Started</th>
<th>Semester Started Term</th>
<th>Semester Started Year</th>
<th>Stage of Completion</th>
<th>Semester Completed Term</th>
<th>Semester Completed Year</th>
<th>Expected Graduation Semester</th>
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<th>Organization</th>
<th>Semester Started</th>
<th>Semester Started Term</th>
<th>Semester Started Year</th>
<th>Stage of Completion</th>
<th>Semester Completed Term</th>
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<th>Expected Graduation Semester</th>
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<th>Comments</th>
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</table>

Screen: Promotion and Tenure (first record) > Comments for Promotion and Tenure Report by Section/Strong
Items: All rows
Criteria: 

<table>
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<th>Section</th>
<th>Strong</th>
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<tbody>
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</table>

Report Generated on [Report Run Date]
1. **Section** is equal to "G.6 Outreach Activities"

[Comment for Section]

### G.8 Personal / Professional Development to Improve Teaching/Extension Effectiveness

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

**Purpose**

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

**Brief Description:** [Brief Description]

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

[Comment for Section]

### G.9 Teaching Awards and Honors

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

[Award or Honor Name], [Organization/Sponsor], [Recognition Level: Recognition Level], [Awarded or Nominated?], ([Month Received Day Received, Year Received]).

**Brief Description:** [Brief Description]

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

[Comment for Section]

### H. Research and Creative Activities

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

[Comment for Section]

### H.1 Publications

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

[Comment for Section]

#### H.1.1 Refereed Journal Articles

**Screen:** Intellectual Contributions  
**Items:** All values  
**Criteria:**  
1. **Was this peer-reviewed/referred?** is equal to "Yes" and **Contribution Type** is equal to "Journal Article" and **Current Status** is one of: "Published", "Accepted", "Submitted"

[Contribution Type] or [Explanation of “Other”] [Current Status]

Report Generated on [Report Run Date]
Screen: Promotion and Tenure (First record) > Comments for Promotion and Tenure Report by Section
Items: All rows
Criteria: 1. Section is equal to "H.1.1 Refereed Journal Articles"

Commented [AR18]: Add title “Role”, file upload for “Full-text of this item”, and populate “comments”

Commented [AR19]: Rename to “H.1.1 Refereed”

Formatted: section_3

Commented [AR20]: Sort list of contributions as follows:

Journal Articles
Abstracts
Books
Chapters
Conference Proceedings
Extension Publication
Monographs
Book Review
Broadcast Media
Cited Research
Instructor’s Manual
Journal Article
Law Review
Magazine/Trade Publication
Manuscript
Material Regarding New Courses/Curricula
Newsletter
Newspaper
Research Report
Software
Study Guide

Commented [AR21]: Add file upload for “Full-text of this item”

Commented [AR22]: Add new section “Publication in Submission” and populate contributions if criteria = current status of "Submitted" and/or "Revising to Resubmit"
Contribution Type or Explanation of “Other”

**List of Contributors** as “[Last Name], [F. N.] [M. N.] ([Current Status]): [Title of Contribution.] In [list of Contributors] as “[F. N.] [M. N.] [Last Name] ([Ed.],[s.]) If this is part of a larger work e.g., a chapter in a book, contribution to a magazine. Title of Larger Work] [Issue Number/Edition ed., vol. Volume, pp. Page Numbers or Number of Pages] [City and State of Journal/Publisher] [Web Address]

Role: [Describe your role]

File upload

Comments

**H.1.4 Artistic and Professional Performances and Exhibits**

**Screen: Artistic and Professional Performances and Exhibits**

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

[Brief Description]

**H.2 Presentations**

**Screen: Presentations**

[Scope]

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

File for Section

Comments

**H.3 Media Contributions**

**Screen: Media Contributions**

[Media Type] or [Explanation of “Other”]. [Media Title/Topic], [Media Name], [Location], [Web Address], ([Start Month Start Day, Start Year - End Month End Day, End Year]).

[Description]

**H.4 Funded Proposals**

**Screen: Contracts, Fellowships, Grants and Sponsored Research**

Current Status is equal to “Funded”

[Abstract]: [Abstract]

Award Letter: [File for Section]

Comments

Commented [AR23]: Sort list of contributions as followed:

- Journal Articles
- Abstracts
- Books
- Chapters
- Conference Proceedings
- Extension Publication
- Monographs
- Book Review
- Broadcast Media
- Citiz Research
- Instructor’s Manual
- Journal Article
- Law Review
- Magazine/Trade Publication
- Manuscript
- Material Regarding New Courses/Curricula
- Newsletter
- Newspaper
- Research Report
- Software
- Study Guide

Commented [AR24]: File upload for “Full-text of this item”

Commented [AR25]: Populate if value is one of “invited or accepted?”, “add file for section”, and populate “comments”

Commented [AR26]: Sort by “Purpose”:

- Extension
- Leadership
- Teaching
- Scholarship/Research
- Service, Community
- Service, Professional
- Service, University

Commented [AR27]: Populate “File” for award letter, abstract, and comments text box
Items: All rows
Criteria:
1. **Section** is equal to "H.4 Pending or Rejected Proposals"

[Comment for Section]

**H.45** Pending or Rejected Proposals

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

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

Abstract: [Abstract]
Award Letter: [File for Section]

[Comments]

**H.56** Creative Activities / Research and Development of New Items

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

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

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

[Comments]

**H.67** Personal/Professional Development to Improve Research Effectiveness

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

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

Brief Description: [Brief Description]

[Comments]

**H.75** Research Awards and Honors

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

[Award or Honor Name], [Organization/Sponsor] Recognition Level: [Recognition Level], [Awarded or Nominated?]. ([Month Received Day Received, Year Received]).

Brief Description: [Brief Description]

Commented [AR28]: Populate "File" for award letter, abstract, and comments text box

Commented [AR29]: Populate comments

Commented [AR30]: Populate brief description

Commented [AR31]: Populate "Recognition Level", "Awarded or Nominated", "Brief Description"
1. **Section** is equal to "H.6 Research Awards and Honors"

   [Comment for Section]

### I. Service

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

   [Comment for Section]

#### 1.1 Department Service

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

   [Comment for Section]

#### 1.2 College Service

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

   [Comment for Section]

#### 1.3 University Service

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

   [Comment for Section]

#### 1.4 Other Professional Service

#### Screen: Promotion and Tenure (first record) > <strong>Comments for Promotion and Tenure Report by Section</strong>
- **Items:** All rows
- **Criteria:**
  - 1. **Section** is equal to "I.4 Other Professional Service"

   [Comment for Section]
**I.5 Public Service**

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

Items: All rows
Criteria:
1. <em>Section</em> is equal to "I.5 Public Service"

[Comment for Section]

**I.6 Personal/Professional Development to Improve Service Effectiveness**

Screen: Faculty Development Activities Attended

Items: All records
Criteria:
1. <em>Purpose</em> contains one of the substrings: "Leadership", "Service"

**I.7 Service Awards and Honors**

Screen: Awards and Honors

Items: All records
Criteria:
1. <em>Purpose</em> contains the text "Service"

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

Items: All rows
Criteria:
1. <em>Section</em> is equal to "I.7 Service Awards and Honors"

[Comment for Section]

**J. Awards and Honors**

Screen: Awards and Honors

Items: Records not displayed above

[Comment for Section]

**K. Unit Promotion and Tenure Criteria**

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

Items: All rows
Criteria:
1. <em>Section</em> is equal to "K. Unit Promotion and Tenure Criteria"
K.1 Department PTE Document

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

Field for Section

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

Field Code Changed

K.2 College PTE Document

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

Field for Section

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

Field Code Changed

L. Annual Review Reports

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

Field for Section

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

Field Code Changed

L.1 All Annual Reviews

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

Field for Section

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

Field Code Changed

L.2 Third Year Review Report

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

Field for Section

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

Field Code Changed
NORTH DAKOTA STATE UNIVERSITY
Promotion and Tenure Portfolio
Part II

A. Recommendations

1. Department PTE Committee Recommendation Letter

2. Department Chair Recommendation Letter

3. College PTE Committee Recommendation Letter

4. College Dean Recommendation Letter

5. Provost Recommendation Letter

6. President Approval/Recommendation Letter

B. Letters of Evaluation (not required)

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

2. External Letters of Evaluation