

# **PREPARING & SUBMITTING ELECTRONIC PROMOTION MATERIALS FOR TEACHING & CLINICAL FACULTY**

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TUESDAY, MAY 20, 2025  
9:30 A.M. – 11:00 A.M.

# Introductions

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We want to know who's with us today, and for you to be able to reach out to your peers who are going through this process with you.

Please respond to the Zoom poll.

# Welcome!

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## Goals for today

- ❖ Have an operational overview of the process
- ❖ Consider how your materials will reflect the 2025-26 Provost's guidelines
- ❖ Be familiar with the tools for preparing and submitting your portfolio
- ❖ Know how to get help
- ❖ Have your pressing questions answered

# Electronic Submission is a Three-Step Process

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Step 1: Request a folder on the P&T SharePoint using the online request form at <https://www.uml.edu/pandt> by July 1, 2025.

Step 2: Create and refine two pdfs on your desktop—the main and supplemental files—using Adobe Acrobat throughout the summer.

Step 3: Upload your two completed PDFs to the SharePoint between September 8 and September 15, 2025 at 5pm.

# Operational Overview

## Timeline: Your Actions

**Now:** Review 2025-26 guidelines; plan, create, and organize your materials; seek peer/mentor feedback



SharePoint will be available for upload  
(Candidates with folders will receive an email reminder.)



Deadline to upload main portfolio and  
supplemental materials PDFs by 5pm.

**After 9/15:** Track levels of review in the MSP schedule;  
submit responses/addenda as needed to  
[PandT@uml.edu](mailto:PandT@uml.edu), CC Dep't Chair & Dean

# Key Dates

<b>9/15/25</b> 5:00pm ET	Deadline for individuals to file for promotion and tenure and to submit all necessary supporting materials for Department Chairpersons (via file share).
9/17/25	Provost's Preparation Meeting for Review Committees, 9:00-10:30am (register by 9/10/25)
<b>10/6/25</b>	Deadline for Chairpersons to submit all individual promotion and tenure materials (inclusive of external letters and reviewer information) for Department Personnel Committees.
<b>10/27/25</b>	Deadline for Department Personnel Committees to forward recommendations and personnel materials for Chairpersons.*
11/3/25	Last day for candidates to file responses to recommendations from Departmental Personnel Committees.**
<b>11/10/25</b>	Deadline for Chairs to forward recommendations and personnel materials for College Personnel Committees.*
11/19/25	Last day for candidates to file responses to recommendations from Chairpersons.**
<b>12/1/25</b>	Deadline for College Personnel Committees to forward recommendations and personnel materials for college deans.*
12/8/25	Last day for candidates to file responses to recommendations from College Personnel Committees.**

\*\* Candidates should email response letters to [pandt@uml.edu](mailto:pandt@uml.edu) for upload.

# Key Dates, cont'd

<b>1/12/26</b>	Deadline for college deans to forward recommendations and personnel materials for the Rank and Tenure Committee.*
1/19/26	Last day for candidates to file responses to recommendations from Deans.**
2/5 and 2/6/26	University Rank and Tenure committee meets to review applications.
<b>2/17/26</b>	Deadline for University Rank and Tenure Committee to forward recommendations and personnel materials for Provost.*
2/24/26	Last day for candidates to file responses to recommendations from Rank and Tenure Committee.**
<b>3/2/26</b>	Deadline for Provost to forward recommendations and personnel materials for Chancellor.*
3/9/26	Last day for candidates to file responses to recommendations from the Provost.**
3/16/26	Deadline for Chancellor to issue list of recommended candidates for tenure and promotion (before appeals).*
3/23/26	Deadline for eligible candidates to submit appeal to Chancellor.

\*\* Candidates should email response letters to [pandt@uml.edu](mailto:pandt@uml.edu) for upload.

## Goals

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# Provost's Guidelines

## PDF#1: Main Portfolio Content

**These materials may not be edited after the submission deadline.**

- Cover page, to include:
  - name
  - present rank
  - department and college
  - date of appointment at the University of Massachusetts Lowell and rank awarded
  - area of specialization within the discipline
- Candidate's Curriculum Vitae (CV) (MSP contract Appendix A-9, Personnel Form #6)  
The CV is intended to provide the accomplishments of the candidate's entire career, including the specific details of accomplishments at UMass Lowell. Accomplishments from the period under review are typically provided in bold face type. There is no page limit for the CV.
- Candidate's Narrative—recommended length, approximately 5 to 7 pages
- Instructional Activity Chart ([Appendix 6](#))

# Provost's Guidelines

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## PDF #2: Supplemental Materials Content

These materials may not be edited after the submission deadline.

### Required

- All annual or periodic evaluations by the Department Personnel Committee, department chair, and dean (include formal evaluations and classroom observations of teaching; exclude reappointment letters)
- Student evaluations from the period under review, **including scanned copies of all pages/sides of all completed evaluation forms**, including numerical ratings and written comments. (Per agreement with MSP faculty are not required to share evaluation results from Spring 2020, Fall 2020, and Spring 2021; candidates may include evaluations from these semesters if they wish.)

### Optional

- Supplemental content that significantly advances or illustrates the case that cannot be sufficiently expressed in the CV or narrative – in consideration of the readers, the candidate should include only the most critical items, and should label them clearly
- COVID-19 Personal Impact Statement

There is no preclusion of the candidate to include any item that they deem important. However, candidates are advised that reviewers are unlikely to put weight on ancillary material or documentation beyond what is indicated above. Accordingly, candidates are advised to focus their efforts to ensure that their narrative and CV are thorough and complete.

# Preparing the Instructional Activity Chart (Appendix 6) and Student Evaluations

- Gather and organize early
- **Batch and scan; apply clear file names**
- Calculate averages, if needed
- Complete Appendix 6, the [Instructional Activity Chart](#) – *Our sample now includes tips for customizing your chart.*

# Instructional Activity Chart (Appendix 6)

## Example

Instructional summary by semester for the period under review						
	Course Title	Number and Section	Course Credits	Contact Hours	Enrollment	Average of Evaluation Items on a scale of 5 <sup>1</sup>
Fall 2019			10	12	110	4.36
	Intro to X	xxxx.1xxx-202	3	3	47	4.23
	Intro to X	xxxx.1xxx-209	3	3	44	4.1
	Advanced Y*	xxxx.4xxx-201	4	6	19	4.75
Spring 2020			12	12	127	4.16
	Intro to X	xxxx.1xxx-201	3	3	40	4.3
	Intro to X	xxxx.1xxx-204	3	3	46	4.41
	Intro to X**	xxxx.1xxx-301	3	3	22	3.78
	Topics in Z	xxxx.4xxx-201	3	3	19	4.81
TOTALS	Unique Courses	Sections	Total Course Credits	Total Contact Hours	Total Enrollment	Overall Average of Evaluation Items <sup>1</sup>
	3	7	22	24	237	4.34

\* service learning course

\*\* online course, overload

\*\*\* X% return <or other label>

<sup>1</sup> Items calculated: 1.Syllabus 2.Preparation 3.Assignments 4.Feedback 5.Engagement 6.Recommend

- Provide the basic data
- Include scale
- Indicate how average was calculated
- Contact hours = weekly hours of class meeting
- Add notes as needed

# SFI Data for Appendix 6

Reports

Help

Exit

Recent Reports

Evaluation Reports

Course Section Reports

Survey Intelligence Reports

Survey Intelligence Report Designs

Search:

Show 10 entries

Name	Category	Owner	Created	Updated	Share Option	View	Export	PDF
2023 Winter SFI Brief Summary		2103597939	Jan 18, 2023	Jan 18, 2023	🔒	📊	📄	📄
2024 Fall SFI Brief Summary		2103597939	Mar 31, 2025	Mar 31, 2025	🔒	📊	📄	📄
2024 Spring SFI Brief Summary		9893624888	May 21, 2024	May 21, 2024	🔒	📊	📄	📄
2024 Summer/Trimester SFI Brief Summary		2103597939	Mar 31, 2025	Mar 31, 2025	🔒	📊	📄	📄
2024 Winter SFI Brief Summary		2103597939	Mar 31, 2025	Mar 31, 2025	🔒	📊	📄	📄
2025 Winter SFI Brief Summary		2103597939	Mar 31, 2025	Mar 31, 2025	🔒	📊	📄	📄
Promotion and Tenure SFI Summary		9893624888	Apr 4, 2025	Apr 4, 2025	🔒	📊	📄	📄

Showing 11 to 17 of 17 entries

Previous12

## Promotion and Tenure SFI Summary



Promotion and Tenure SFI Summary Report

Results By						Survey Responses		Survey Focused Questions		People Focused Questions																				Compare		
#	Survey Period	Evaluated Individual	Course Number	Course Section	Course Name	Sky Rvr	Exp. %	The course was well organized.	The course increased my knowledge of this subject area.	The instructor clearly outlined course learning objectives, requirements, grading criteria, and student res	The instructor provided an acceptable level of interaction in the course.	The instructor's syllabus clearly outlined course learning objectives, requirements, and student res	The instructor provided timely feedback in relation to assessments, email, and/or discussion questions.	The instructor was present for all class meetings and used the full class period.	The instructor's evaluation of my performance has been objective and consistent with the faculty's g	Instructor in this class contributed to my learning.	The instructor used class time to promote student learning.	The instructor clearly explained the course material.	The instructor provided useful feedback on my work/performance.	The instructor gave useful feedback to exams, quizzes, or assignments.	The instructor provided useful feedback in a timely fashion.	The instructor was knowledgeable about and engaged with the subject.	The instructor's evaluation of my performance has been objective.	The instructor showed interest in my learning and understanding of the course material.	The instructor shows interest in student learning and success.	Based on my experience in this course, I would recommend this instructor to a fellow student.	What is your overall rating of this instructor's teaching?	Overall	Score	Compare		
								5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean	5-pt Mean
1	Fall 2023	Michelle Thompson	2102-2100	20	Math 2: Calculus I	8	22 36	-	-	5.0	4.9	-	5.0	-	5.0	4.9	-	4.9	-	5.0	-	5.0	-	5.0	-	5.0	-	5.0	-	5.0	5.0	<div></div>
2	Fall 2023	Michelle Thompson	2102-2100	21	Math 2: Calculus I	10	31 32	-	-	4.9	4.9	-	4.9	-	4.9	4.9	-	4.9	-	5.0	-	5.0	-	4.9	-	4.9	-	4.9	-	4.9	4.9	<div></div>
3	Fall 2023	Michelle Thompson	2102-2100	22	Math 2: Calculus I	4	10 40	-	-	5.0	5.0	-	5.0	-	5.0	5.0	-	4.8	-	5.0	-	5.0	-	5.0	-	5.0	-	5.0	-	5.0	5.0	<div></div>
4	Fall 2023	Michelle Thompson	2102-2100	23	Math 2: Calculus I	11	20 55	4.9	4.9	-	-	5.0	-	4.9	-	-	5.0	-	4.9	-	4.9	-	4.9	-	5.0	-	4.9	-	4.9	4.9	<div></div>	
5	Fall 2023	Michelle Thompson	2102-2100	24	Math 2: Calculus I	13	19 68	4.9	4.5	-	-	5.0	-	5.0	-	-	4.9	-	4.9	-	4.9	-	4.9	-	4.9	-	4.9	-	4.9	4.9	<div></div>	
6	Fall 2023	Michelle Thompson	2102-2100	25	Math 2: Calculus I	10	26 38	4.9	4.8	-	-	4.7	-	4.7	-	-	4.5	-	4.9	-	4.9	-	4.9	-	4.9	-	4.9	-	4.8	4.8	<div></div>	
7	Fall 2023	Michelle Thompson	2102-2100	26	Math 2: Calculus I	10	19 53	4.9	4.8	-	-	4.9	-	5.0	-	-	5.0	-	5.0	-	5.0	-	5.0	-	4.9	-	5.0	-	4.8	4.9	<div></div>	
8	Spring 2024	Michelle Thompson	2102-2100	27	Math 2: Calculus I	7	17 41	-	-	4.7	4.7	-	4.9	-	4.9	4.7	-	4.9	-	4.9	-	4.9	-	4.9	-	4.9	-	4.7	-	4.8	4.8	<div></div>
9	Spring 2024	Michelle Thompson	2102-2100	28	Math 2: Calculus I	6	22 27	-	-	5.0	4.8	-	5.0	-	5.0	5.0	-	5.0	-	5.0	-	5.0	-	5.0	-	5.0	-	5.0	-	5.0	5.0	<div></div>
10	Spring 2024	Michelle Thompson	2102-2100	29	Math 2: Calculus I	15	17 88	4.9	4.4	-	-	4.7	-	4.6	-	-	4.7	-	4.7	-	4.7	-	4.4	-	4.5	-	4.8	-	4.8	4.6	<div></div>	
Grand Total: 149						295	91	4.8	4.6	4.9	4.9	4.9	5.0	4.8	4.9	4.9	4.8	4.9	4.9	5.0	4.9	5.0	4.8	5.0	4.9	4.9	4.8	4.8	4.9			

# Download SFI Comments for Supplemental Materials

anthology

Course Evaluations

University of Massachusetts Lowell

Home

Surveys

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Type

Standard

Department

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Year

Show All

Search

Survey Name

Starts with

Period

Show All

Focus

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Status

Show All

Survey

Show All

View

Comparative

Settings

STANDARD survey...

View

PDF

Print

Evaluation Reports

Search:

Show 50 entries

Course Number - Section ID	Survey Name	Year	Period	Status	Close Date	Course Name	Responsible Faculty	Department	Resp. Rec'd	Resp. Exp.	% Rec'd	Include	Access Role
ENGL 1020 - 280	Fall 2024 15 week	2024	Fall 2024	Closed	Dec 26, 2024	College Writing II (Formerly 42 102)	Michaels, Tracy	ENGL	11	20	55%	<input checked="" type="checkbox"/>	?
ENGL 1020 - 282	Spring 2024 Survey #3 15 week	2024	Spring 2024	Closed	Apr 27, 2024	College Writing II (Formerly 42 102)	Michaels, Tracy	ENGL	19	17	88%	<input checked="" type="checkbox"/>	?
ENGL 1020 - 301	Fall 2024 15 week	2024	Fall 2024	Closed	Dec 20, 2024	College Writing II (Formerly 42 102)	Michaels, Tracy	ENGL	12	19	63%	<input checked="" type="checkbox"/>	?
ENGL 1020 - 313	Spring 2024 Survey #3 15 week	2024	Spring 2024	Closed	Apr 27, 2024	College Writing II (Formerly 42 102)	Michaels, Tracy	ENGL	17	19	89%	<input checked="" type="checkbox"/>	?
ENGL 1020 - 314	Spring 2024 Survey #3 15 week	2024	Spring 2024	Closed	Apr 27, 2024	College Writing II (Formerly 42 102)	Michaels, Tracy	ENGL	16	18	89%	<input checked="" type="checkbox"/>	?
ENGL 2160 - 082	Fall 2021 Survey 4 - 15 and 8 week2 Online Courses	2021	Fall 2021	Closed	Dec 18, 2021	Monsters, Apes & Nightmares (Formerly 42.216)	Michaels, Tracy	ENGL	8	22	36%	<input checked="" type="checkbox"/>	?
ENGL 2160 - 082	Fall 2024 8 week2	2024	Fall 2024	Closed	Dec 20, 2024	Monsters, Apes & Nightmares	Michaels, Tracy	ENGL	10	26	38%	<input checked="" type="checkbox"/>	?
ENGL 2160 - 46	Summer 2022 5-week2	2022	Summer 2022	Closed	Aug 16, 2022	Monsters, Apes & Nightmares (Formerly 42.216)	Michaels, Tracy	ENGL	10	23	43%	<input checked="" type="checkbox"/>	?
ENGL 2160 - 81	Fall 2023 Survey #1 8wk1	2023	Fall 2023	Closed	Oct 29, 2023	Monsters, Apes & Nightmares (Formerly 42.216)	Michaels, Tracy	ENGL	19	31	61%	<input checked="" type="checkbox"/>	?

# Goals

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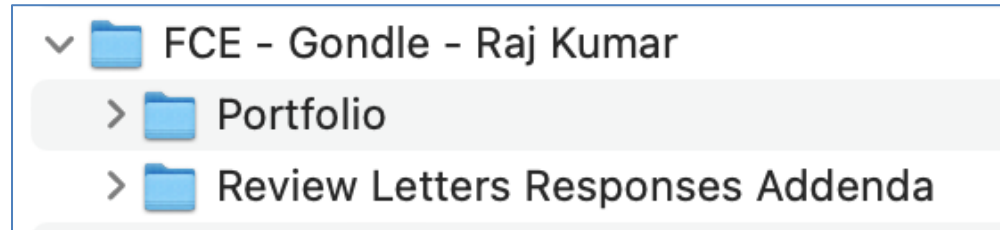
- Have an operational overview of the process
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# Promotion Electronic Files on SharePoint

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The SharePoint contains candidate folders sorted by college, last name, first name.

Each candidate folder contains two additional folders:





# Promotion SharePoint Structure

## Folder #1 Portfolio

Candidate has write access until September 15, when the folder will be "frozen."

After September 15, the candidate has read access.

Items include two PDF files:

- 1) Main Portfolio
- 2) Supplemental Materials

## Folder #2 Review Letters, Responses, Addenda

[PandT@uml.edu](mailto:PandT@uml.edu) has write access and uploads all documents.

Items Include:

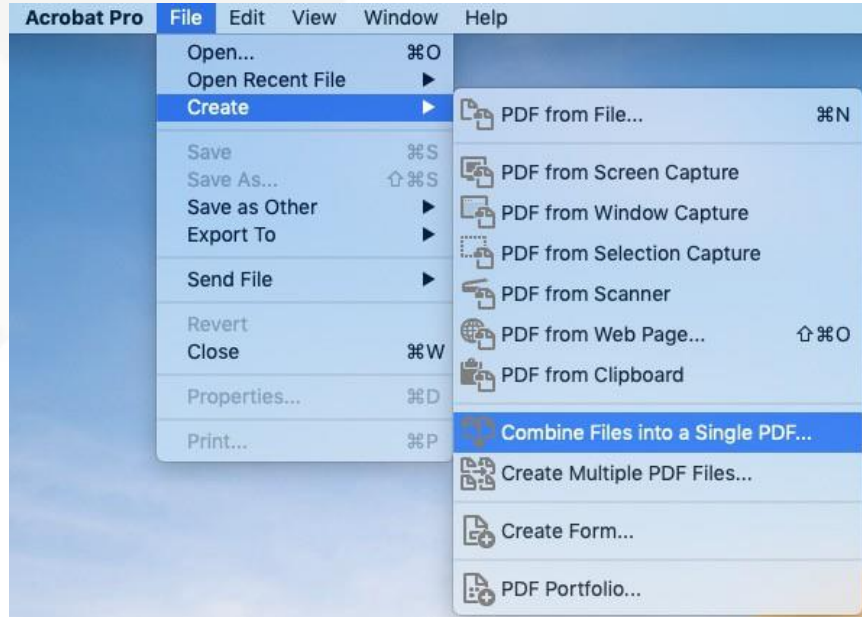
- 1) Review Letters
- 2) Addenda from Candidates:
  - Honors or awards received after final submission of the candidate's portfolio
- 3) Any candidate responses to recommendation letters by various levels of review.

# Preparing Materials

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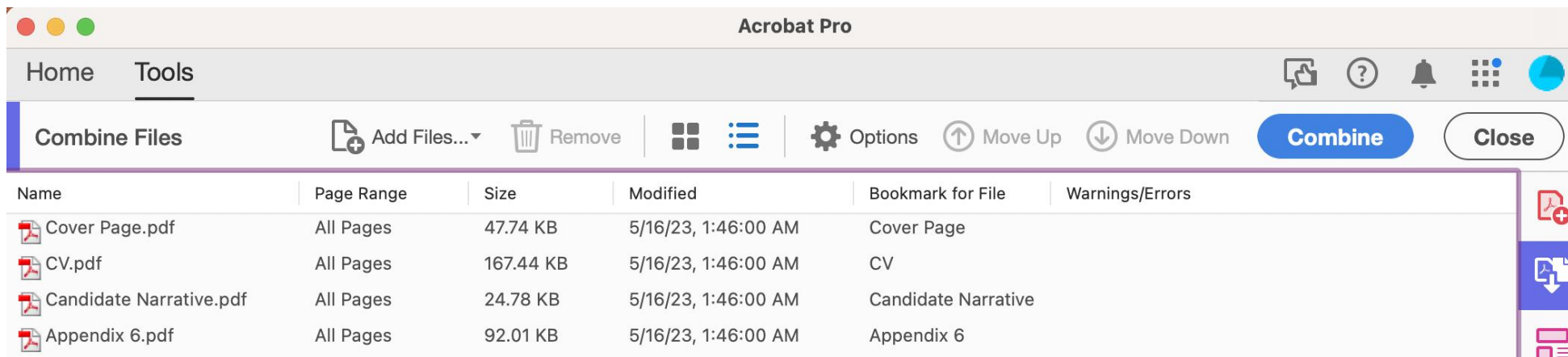
- Update to Adobe Acrobat, if needed
- Create materials on your desktop
- Convert items to PDF as you go; name files for easy recognition/bookmarks
- Create two PDFs for submission: order of materials in each file should follow the guidelines
- Clean up bookmarks list

# Portfolio Creation



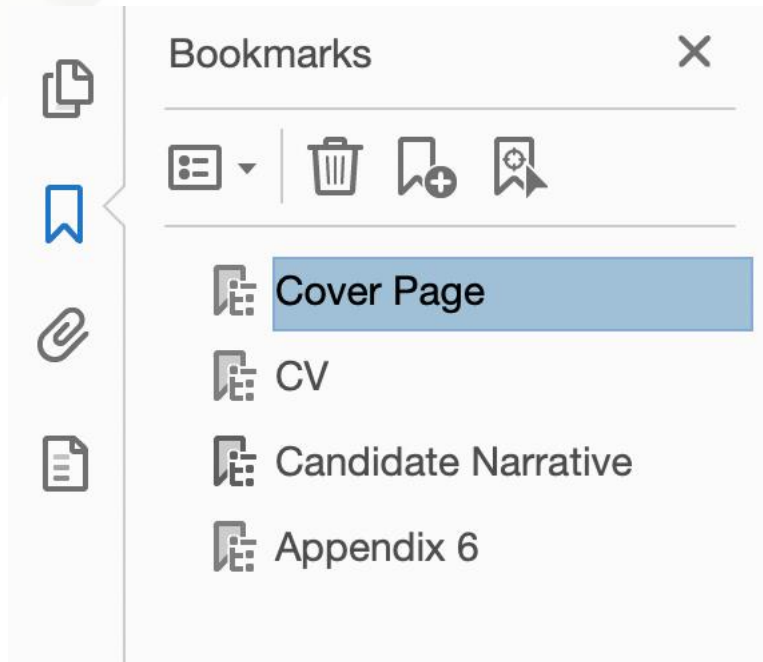
File → Create → Combine Files into a Single PDF

- Drag & Drop
- Reorder (Move Up/Down)
- Select Combine



# Portfolio Creation

## (continued)



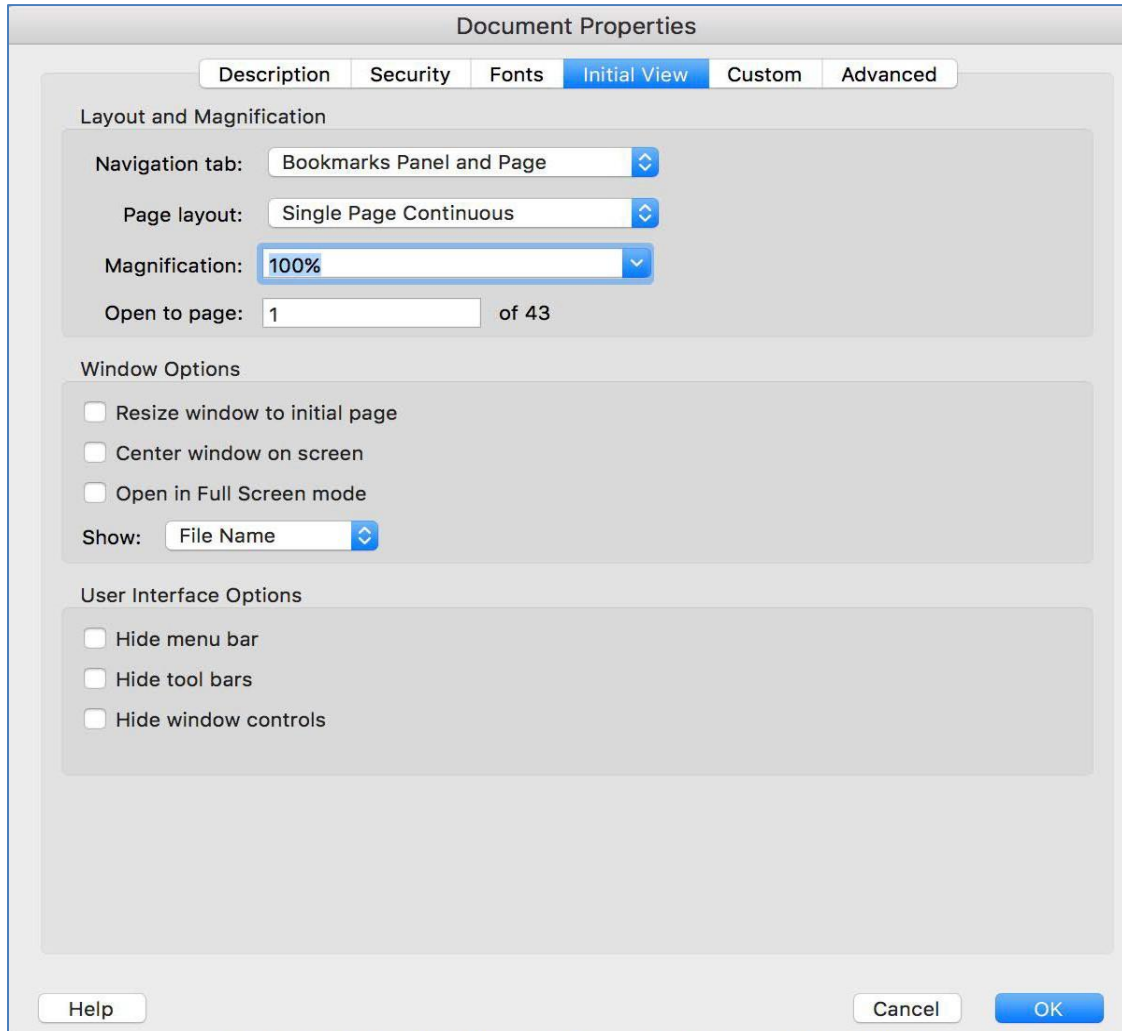
### Readers need clear bookmarks!

- File names are automatically imported as bookmarks
- Bookmarks can be edited
- Rearranging bookmarks ≠ rearranging pages
- Deleting bookmarks ≠ deleting pages

# Portfolio Creation (continued)

Set default  
initial view.

**Readers  
expect this  
format!**



The screenshot shows the 'Document Properties' dialog box with the 'Initial View' tab selected. The 'Layout and Magnification' section includes a 'Navigation tab' dropdown set to 'Bookmarks Panel and Page', a 'Page layout' dropdown set to 'Single Page Continuous', a 'Magnification' dropdown set to '100%', and an 'Open to page' field set to '1 of 43'. The 'Window Options' section has three unchecked checkboxes: 'Resize window to initial page', 'Center window on screen', and 'Open in Full Screen mode', followed by a 'Show:' dropdown set to 'File Name'. The 'User Interface Options' section has three unchecked checkboxes: 'Hide menu bar', 'Hide tool bars', and 'Hide window controls'. At the bottom are 'Help', 'Cancel', and 'OK' buttons.

Document Properties

Description Security Fonts Initial View Custom Advanced

Layout and Magnification

Navigation tab: Bookmarks Panel and Page

Page layout: Single Page Continuous

Magnification: 100%

Open to page: 1 of 43

Window Options

- ☐ Resize window to initial page
- ☐ Center window on screen
- ☐ Open in Full Screen mode

Show: File Name

User Interface Options

- ☐ Hide menu bar
- ☐ Hide tool bars
- ☐ Hide window controls

Help Cancel OK

# Cleaning up your main and supplemental files

**Materials cannot be edited after the submission deadline.**

- Remove locked or password-protected PDFs
- Proofread carefully
- Check bookmarks and links

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# Who needs a SharePoint folder?

**As soon as possible** (by **July 1**), submit a folder request at [www.uml.edu/pandt](http://www.uml.edu/pandt) if you are intending to submit materials this year.

By **September 8**, you will get an email confirming that the SharePoint is available, with instructions for connecting from your PC or Mac.

Upload your two PDF files by:

**September 15**  
at **5:00 p.m.**





## What if I change my mind?

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- Any faculty member may remove their materials from consideration at any point.
- Faculty should consult with their Department Chair before submitting a request to withdraw.
- Please email [PandT@uml.edu](mailto:PandT@uml.edu) with a CC to your Department Chair to request to have your materials removed from consideration.

## What happens after September 15?

- The first review begins at the Department Personnel Committee level on October 6.
- Candidates receive recommendation letters via email according to the [P&T schedule](#) deadlines.
- After September 15, the candidate may submit addenda to the process to share significant new updates.

# Addenda

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Candidate materials are “frozen” on Sept. 15 at 5:00 p.m.; updates can be included via addenda.

- Addenda consist of honors or awards received after final submission of the candidate’s portfolio
- Each addendum should be submitted to [PandT@uml.edu](mailto:PandT@uml.edu) as a single PDF:
  - Address the next level of review
  - Give a brief explanation of the addendum & its significance
  - Include any relevant award or acceptance letter
- Only the candidate may submit addenda

# Candidate Response Letters (optional)

- Candidates may provide responses to recommendation letters.
- Response letters are optional and are used to clarify inaccuracies or oversights in a recommendation letter.
- Address response letters to the next level of review.
- Submit to [PandT@uml.edu](mailto:PandT@uml.edu) in accordance with the [P&T schedule](#).

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# Getting Help

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- Our website: [www.uml.edu/PandT](http://www.uml.edu/PandT)
  - Provost's guidelines, calendar, user guides, and useful links
- Department Chair and Colleagues
- P&T Team Help session
  - Schedule early
- Email "hotline": [PandT@uml.edu](mailto:PandT@uml.edu)

# Goals

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