General Instructions for Online Post-Tenure Review Packets

As of Fall 2013, online packets are required for post-tenure review candidates seeking a "superior" rating.

This document should be used in conjunction with the *Faculty/Administration Manual* and provides information on the construction of these online packets, including instructions on the creation and naming of documents to be loaded into the online system. Post-tenure review candidates should turn to the *Faculty/Administration Manual*, rather than this document, for guidance on the content of their packet and individual documents.

In developing this online packet process for post-tenure review, our objective has been to provide convenience for reviewers (including a uniform ordering of documents) without overly burdening candidates. We welcome your feedback.

This document includes the following information:

I. Access to online post-tenure review packets

The College uses SharePoint sites for the creation and review of PTR candidate's online packets, which are created in document libraries in SharePoint. To access the SharePoint sites, candidates and reviewers are emailed direct links from our system administrator. Sites may also be accessed via the following URLs:

➢ **Candidates** access https://cofc.sharepoint.com/sites/ptr/school/dept/lastname *
➢ **Reviewers** access https://cofc.sharepoint.com/sites/ptr/school/dept *
➢ **Deans** access https://cofc.sharepoint.com/sites/ptr/school *
➢ **All faculty** have access to the PTR procedures and resources site at *https://cofc.sharepoint.com/sites/ptr/resources*

* **Note:** In the websites listed above, "school" is the school abbreviation (sota, bus, ehhp, hss, lcwa, ssm, or libr); "**Dept**" is the four-letter department or program abbreviation (ex: arts, chem, hist); and "**Lastname**" is the faculty candidate's last name with no spacing or special characters except hyphenated last names.

Online post-tenure review packets are on a SharePoint site accessible to users on or off campus using the urls listed above. Users who do not have access rights to higher level sites cannot access them.

II. General structure of on-line post-tenure review packets, including information on access[1]

This section provides a general overview of the structure of online post-tenure review packets, with more specific details, such as naming conventions, outlined in the table that follows.

- Each participating department will have a SharePoint site, labeled by school and department (*e.g.*, "cofc.sharepoint.com/sites/ptr/ssm/phys") containing:
    - A document library for each faculty member under review (*e.g.*, "cofc.sharepoint.com/sites/ptr/ssm/phys/garcia"), and
    - Any statement of additional departmental standards for post-tenure review, in cases where those exist.

- Each faculty member will load the following documents in their library:
    - Letter indicating the rating for which he/she wishes to be considered,
    - Curriculum vitae,
    - Statement on teaching, research, and service addressing accomplishments since the last review and future plans and goals,
    - Annual evaluations,
    - Course-Instructor Evaluations (numerical summary pages from Blue reports) for all evaluated courses taught by the candidate during the period of the review,
    - Clear evidence that the candidate continues to perform at the level expected for promotion to Professor or Librarian IV, in accordance with the criteria of the *Faculty/Administration Manual*, as indicated in Section VI.A.4.c for instructional faculty and VI.C.4.d for library faculty. Evidence is to be compiled for the intervening period between promotion evaluation and/or post-tenure reviews. As with tenure and promotion reviews, for publications and equivalent creative activities, this should include evidence of peer-review and quality,
    - Other such documents as may be directed by the faculty member's department chair, the dean, or the Provost,
    - List of any materials submitted in hard copy, and
    - Any additional materials, contained in their supplementary folder.

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[1] A table indicating how individual documents will be labeled in provided in Section IV of this document.

- Once those items are loaded, candidate access, including view access, will be turned off. At this point, typically just the Department Chair or, in certain cases, a departmental panel, will have access to the candidate's document library, as will higher level reviewers.

- Each faculty member's library will also contain the following:
  - Two or more letters from intra- and/or extra-departmental peers concerning aspects of the candidate's teaching (or, for librarians, professional competency). At least two of these letters must be based, in part, on peer review of candidate's course materials and/or peer observation of candidate's classroom performance by two senior faculty colleagues. As these letters would not normally be provided to the candidate, they will be entered into the candidate's document library by the Chair, after candidate access has been turned off.
  - Chair's letter (or departmental panel letter, in cases where the chair is seeking a superior post-tenure review rating in the same year), and
  - Dean's recommendation, once written.

- All documents will be in PDF format. Some will be created by scanning existing paper documents; the final document submitted must be of good quality.

- Our general approach has been to ask that large single PDF documents be created, rather than many smaller PDF documents. However, in situations where a candidate is having difficulty creating a single PDF file because of limitations on the size of a document created from scanned materials, we suggest splitting the larger document into several (as described below).

- Books and other materials that cannot be submitted online may still be submitted in hard copy.

- Additional materials included that are not listed in this document should be labeled so as to follow those listed.

- Access will be assigned as follows:

  - Academic Affairs and department chairs will have ownership access to their candidates' document libraries and will share responsibility for managing others' accesses.
  - The candidate will have "contribute" access to their library until the deadline for the submission of packets, typically November 1. The Chair will remove candidate access when the candidate has finished uploading their documents.
  - Other materials, including confidential materials, will be uploaded by the chair after he/she has confirmed that all candidate access has been removed.
  - When there is a departmental panel, the panel chair will serve in the role of the Department Chair, and other panel members will be given view access after the packet is complete, typically November 15.
  - Academic Affairs will control "contribute" access for deans and higher levels of review, assigning at the departmental level (since Post-Tenure Review Committee membership may vary by department). The Dean, Post-Tenure Review Committee, and Provost will have "read" access throughout substantial portions of the process but will not access packets until they have formally reached those reviewers according to the calendar set out each year.

III.   Instructions for Chair's Verification of Access to Folders

Using the instructions provided below, we will rely on *department chairs* to:

(A) Verify that access permissions to folders on the department's SharePoint site are established as expected, and

(B) Manage SCHL-DEPT group memberships for your department by adding/removing people.

A) Verify that access permissions are established as expected.

I. Review your department site permission settings:

1. Go to your department's site (ex: "*https://cofc.sharepoint.com/sites/ptr/ssm/phys*")

2. On your department's site, in the top right corner, click ⚙️ **Settings**, and click **Site settings**.
   If you don't see **Site settings**, click **Site information**, and then click **View all site settings**.

3. On the **Site Settings** page, under **Users and Permissions**, click **Site Permission.** You will see a list of all the individuals and groups who have access to the site, as well as the level of permissions that they have.

II. Review the unique permissions for the one folder (*a.k.a.* Document Libraries) on a candidate's subsite:

In SharePoint, permissions at the site level are propagated to lower level subsites or folder (document libraries) via *parent inheritance*, or alternatively, the parent inheritance may be broken to give each lower level object its own *unique permissions*. In building candidate subsites, the parent inheritance from the candidate subsite to the candidate's folder (document library) is removed before the candidate is emailed their subsite URL, and the folder is granted unique permissions. Chairs must not revert the permissions on a candidate's folder (document library) back to the parent inheritance. Please **review** the unique permissions outlined below and confirm that the candidate's document library has the correct group and permission levels. *(The next section discusses how to populate members into your department's SharePoint Groups.)*

1. Go to your department's site. (ex: "*https://cofc.sharepoint.com/sites/ptr/ssm/phys*")

2. Open your candidate's subsite.

3. Open the candidate's document library (ex: "*Garcia, Alex (for superior post-tenure review) - PTR Document Library*" folder) from the quick-link list on the left-hand side of the page.

4. In the top right corner, click the gear icon, ⚙️ **Settings** and then **Library settings**.

5. On the **Settings** page, under **Permissions and Management**, click **Permissions for this document library**.

6. Review the groups and/or people listed.
   Alternatively, click "Check Permissions" and then check permissions for a user or group by entering their name or e-mail address.

NOTE: Any folders created within the candidate's document library will inherit the same permissions as the document library it resides in.

(B) Manage the membership of your SCHL-DEPT Groups

Access to candidate's online post-tenure review packets is also managed via a person's membership in a SharePoint Group. Academic Affairs manages the membership of SharePoint Groups, but you may be asked to **review** or revise a group.

To manage a SharePoint site's *People and Groups*:

1. On your department's site, click "view department people and groups."
   o Alternatively: In the top right corner of a department's site, click ⚙ **Settings**, and click **Site settings**. (If you don't see **Site settings**, click **Site information**, and then click **View all site settings**.) Under Users and Permissions, click **People and Groups**.

2. On your **People and Groups** page, in the Quick Launch (left-hand menu), click the name of the group that you want to view or edit. (Or, if you don't see the group that you need to edit, first select "More…" to see an expanded list of all of your groups and then click the name of the group that you want to view or edit.)

3. Review the displayed list of the group members and edit the group as needed.

   o To add a member, Select **New** and **Add Users.** Enter the users and click **Share.** (By default, an email invitation is sent to the newly added user. Click "Show Options" to uncheck this option.)

   o To remove a member, select the check boxes next to the users who you want to remove, click **Actions**, and then click **Remove Users from Group**. In the confirmation window, click **Ok.**

IV.   Post-Tenure Review Online Packets – Table of Folders, Documents, and Accesses

Materials should be named and loaded as follows by candidates and chairs.

Document or folder	Naming convention	Comments
Department's site	Labeled by school and department (*e.g.*, "cofc.sharepoint.com/sites/ptr/school/dept")	
Statement of Additional Departmental Standards for Post-Tenure Review (if any)	"*Name of Department* Standards for Post-Tenure Review"	Uploaded by Office of the Provost. Viewable by candidate, chair, and higher levels of review
Candidate's document library	Named "Post-TenureLast name" (*e.g.*, "Post-TenureGarcia")	Documents below are to be uploaded by the candidate unless otherwise specified. Access varies over time.
Letter from the candidate, indicating rating sought	"01 Last name rating sought" (*e.g.*, "01 Garcia Superior")	
Curriculum vitae	"02 Last name CV" (*e.g.*, "02 Garcia CV")	
Narrative	"03 Last name Narrative" (*e.g.*, "03 Garcia Narrative")	
Annual Evaluations	"04 Last Name Annual Evaluations"	All annual evaluations for the evaluation period should be scanned into a single PDF document in chronological order.
Course-Instructor Evaluations	"05 Last Name Course-Instructor Evaluations"	A single PDF document should contain Course-Instructor Evaluation reports (summary pages with numbers) for all sections.

Document or folder	Naming convention	Comments
Publication or creative activity 1	"06 Last Name Type of Research Activity 1" (*e.g.*, 06 Garcia Publication 1)	For each scholarly work, a single PDF document[2] will contain: a publication or creative activity, along with evidence of peer review and quality.
Publication or creative activity 2	"07 Last Name Type of Research Activity 2"	As above
Publication or creative activity 3	"08 Last Name Type of Research Activity 3"	As above
Candidate-provided teaching evidence	"09 Last Name Teaching Evidence"	A single PDF document will contain syllabus and teaching materials submitted by the candidate on all courses.
Service evidence	"10 Last Name Service"	Single PDF document
List of materials being submitted in hard copy *(if applicable)*	"11 Last name Hard Copy Submissions"	Books and other materials that cannot be submitted online can be submitted in hard copy and should be listed here.
Supplementary Folder *(in Candidate's folder)*	" Supplementary" *(in Candidate's folder)*	Supplementary folder contains any additional materials, numbered and labeled appropriately
Candidate access to their document library has been turned off at this point		
Letters from intra- and/or extra-departmental peers addressing teaching (or, for librarians, professional competency)	"13 Last Name Teaching Letters"	All such reviews will be scanned into a single PDF document. Uploaded by chair after candidate access is turned off.
Chair's Letter	"14 Last Name Chair's Letter"	Uploaded by chair. In cases where there is a departmental panel, the chair of that panel will have access and will load this letter.
Chair's Checklist	"15 Last Name Packet Checklist"	Uploaded by chair after verifying inclusion of all documents and confirming that all folder permissions are correct. In cases where there is a departmental panel, the chair of that panel will have access and will load this letter.
Dean's Letter	"16 Last Name Dean's Letter"	Uploaded by Dean's Office

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[2] Photocopiers with scanning abilities and some other scanners may limit the size of scanned documents, often to 50 or 100 pages, depending on the machine. The library's KIC scanner has a much greater capacity. In situations where a candidate is having difficulty creating a single PDF file because of limitations on the size of a document created from scanned materials, please create several documents labeled as XXX Part1, XXX Part 2, etc. We will not require tables of contents for documents. The College has a site license for Adobe Acrobat Pro; candidates may contact the Helpdesk to request that this software be installed on their College computer.

V. Post-Tenure Review Online Packet - Checklist for Reviews for Superior Rating

Candidate's Name: _____

Each item on this checklist should be entered as a single PDF document unless otherwise indicated or unless document size requires splitting scanned materials into several documents. Items should be labeled and numbered as indicated below.

Departmental Site

___ Statement of additional departmental standards for post-tenure review (if any)

Candidate's Document Library

Candidate has access until November 1 to load the following documents:
___ 01 Letter from candidate, indicating rating sought
___ 02 Curriculum vitae
___ 03 Narrative (covering teaching, research, and service)
___ 04 All Annual Evaluations (for the evaluation period in chronological order)
___ 05 Numerical Summary pages of all Course-Instructor Evaluation Reports (for all sections taught during the evaluation period)
___ 06 Publication or Creative Activity 1, including evidence of peer review and quality
___ 07 Publication or Creative Activity 2, including evidence of peer review and quality
___ 08 Publication or Creative Activity 3, including evidence of peer review and quality
___ 09 Candidate-provided teaching evidence for all courses
___ 10 Service evidence
___ 11 List of materials being submitted in hard copy *(if applicable)*
___ 12 Supplementary folder

The chair (or, in the case of dean's letter, the Dean's Office) should upload the following only after candidate access, including any view access, has been removed.
___ 13 Letters from at least two intra- and/or extra-departmental peers addressing teaching
    (or, for librarians, professional competency)
___ If there is a panel, access is provided to them by panel chair after peer letters have been loaded.
___ 14 Chair's letter
___ 15 Chair's checklist
___ Access for any departmental panel should be turned off once the panel has concluded their work and written their letter.
___ 16 Dean's letter

General
___ Chair notifies Office of the Provost that the packet is formally leaving the Department for the Dean's Office.
___ All documents are in PDF format and are of good quality for viewing
___ Items are in the correct sections and labeled and ordered as requested
___ Any hard copy materials have been forwarded

_____   _____
Signature of Chair   Date