

*PROMOTION, TENURE, & PERMANENT STATUS*  
*TEMPLATE 2018-19*  
**VERSION DATE December 20, 2017**

This template must be used by all candidates for promotion, tenure or permanent status.

Please fill in the template with appropriate information related to promotion, tenure, and/or permanent status nominations. Note that some sections will auto-populate with available data from several University sources; you must verify accuracy as indicated. Once all sections are filled in, you may delete the explanatory information in the template, including this page, prior to saving as a PDF file to uploading into the OPT system.

The template includes guidelines on specific content for those portions of the packet that are not auto-populated. All items in the packet must have the materials in the same order and titled as shown. **Items should be listed in reverse chronological order.** If a category does not apply, please put “N/A” by that heading; if you have nothing to report, use “None.” Information should cover your professional career, unless otherwise noted.

The final version of your packet should contain only those things specifically required in this template or noted in the “Guidelines and Information Regarding the Tenure, Permanent Status and Promotion Process” available online at <http://www.aa.ufl.edu/tenure> .

Once completed, the template must be uploaded into the Online Promotion and Tenure (OPT) system as a PDF file. Once uploaded, any changes that need to be made on the template will require that it be saved again as a PDF and uploaded again. You may repeat the upload process as many times as necessary, until the packet has been certified. Your departmental or unit OPT administrator will work with you on certification. (A list of all departmental OPT administrators can be found at <https://connect.ufl.edu/aa/Provost/PT/Lists/PTAdmins/AllItems.aspx> )

After the packet is certified, you may not make changes to the information in your packet, but any changes or additions must be uploaded into Section 33 (Further Information) as PDF files. You may upload additional documents beyond those required by the template and “Guidelines” as PDF files into Section 33. Note that such documents should be limited in number and scope. For information on how to create and manage PDF files, you may contact the UF Help Desk at 352-392-4357.

Supporting materials (copies of articles, books, CD, etc.) should be made available through your departmental or unit office. Do not upload these materials into the template or the OPT system.

NOTE: You are responsible for the completeness and accuracy all materials in the online packet, including any auto-populated sections. Please be sure to check the accuracy of the information in your packet.

**1. NOMINEE INFORMATION COVER SHEET**

**This section will auto-populate in the OPT system on a separate Cover Sheet; it is the candidate’s responsibility to check the information that appears on the Cover Sheet for accuracy.** If you find a discrepancy, contact your Departmental OPT Administrator, or the Academic Personnel Office ([opt@admin.ufl.edu](mailto:opt@admin.ufl.edu)).

**2. BRIEF DESCRIPTION OF JOB DUTIES**

Briefly describe your assigned duties and responsibilities.

**3. AREAS OF SPECIALIZATION**

Briefly describe your area(s) of specialization.

**4. EFFORT REPORTED SINCE LAST PROMOTION (NOT TO EXCEED TEN YEARS), OR SINCE UF EMPLOYMENT, whichever is more recent**

**This section will auto-populate from your record in the Effort Reporting System starting with 2011.** If you were employed or promoted at UF prior to 2011, please add your approximate effort into the chart for the earlier years, following the established reporting for effort (see <http://hr.ufl.edu/wp-content/uploads/instructionguides/EffortReportingActivityCategories.pdf>) If you have questions about the effort reported, contact your unit effort reporting coordinator. If you are being considered for tenure or permanent status and were hired during this current academic year, also include assigned activity for the current year at UF.

Term/Year	Teaching	Research	Service	Extension	Clinical	Sabbatical	Leave	Other	Total

**The chair’s/director’s letter should provide an explanation of any significant changes in assignment.**

**5. EDUCATIONAL BACKGROUND**

**This section will auto-populate from your record in the Academic Personnel Office database; it is the candidate’s responsibility to check for accuracy.** If you find a discrepancy, contact Academic Personnel at [opt@admin.ufl.edu](mailto:opt@admin.ufl.edu). If any corrections are made in the Academic Personnel Office database, you will need to save and reload the template again as a PDF file.

Institution	Field of Study	Degree	Year

**6. EMPLOYMENT**

List your employment history, with UF employment appearing first. Please show employer, ranks and administrative positions you held at each place of employment, effective dates of each title and whether or not the position was tenured, tenure-accruing, or non-tenure-accruing if employment was with an institution of higher education.

Institution	Position	Dates

**7. YEAR TENURE/PERMANENT STATUS WAS AWARDED BY UNIVERSITY OF FLORIDA**

**This section will auto-populate from your record in the Academic Personnel Office database; it is the candidate’s responsibility to check for accuracy.** If you find a discrepancy, contact Academic Personnel at [opt@admin.ufl.edu](mailto:opt@admin.ufl.edu). If any corrections are made in the Academic Personnel Office database, you will need to save and reload the template again as a PDF file.

**8. TENURE AND PROMOTION CRITERIA**

**To be entered in OPT system by department administrator. It is the candidate’s responsibility to provide appropriate notice and to check for accuracy of the criteria in her or his case.**

**Candidates note:** If your department’s tenure, permanent status, or promotion criteria have changed during your probationary period or since your last promotion, you may need to provide notice to your chair as to which criteria should be used for your review. The notice period varies across the University, so check with your chair for requirements.

**9. TEACHING, ADVISING, AND INSTRUCTIONAL ACCOMPLISHMENTS**

In no more than 750 words, describe your teaching, advising, professional responsibilities (Librarians), and/or instructional accomplishments, including, as appropriate, curriculum and course development, service as a graduate or undergraduate coordinator, supervised research through credit courses, and the development of new courses, CD ROMs, educational software and multimedia materials.

Undergraduate instructional activities may include supervision of honors thesis and research projects.

Syllabi, course examinations and other materials used in classroom instruction should be made

available at all levels for review as needed or requested. Do not include them in the packet (except for those cases covered in Section 11).

## 10. TEACHING EVALUATIONS

A. **UF teaching evaluations for the past 10 years will auto-populate in this section. In the box provided for each course, you must indicate whether or not the course was team-taught (and the percentage for which you were responsible) and whether the course was required.** (Required courses are General Education courses, or those required for a particular major.) If you have any questions as to the accuracy or completeness of the data, send a query to [evaluations@ufl.edu](mailto:evaluations@ufl.edu). Any inaccuracies must be corrected in the database in order for them to be permanent. If any corrections are made in the Evaluation database, you will need to save and reload the template again as a PDF file. The University process does **not** require a summary of all teaching evaluations. If your college does require a summary, it can be entered in this section. **NOTE:** The departmental and college means are calculated using only either undergraduate or graduate courses, depending on the level of the course being evaluated.

In cases where the number of responses is greater than the number enrolled, provide a footnote explanation.

If teaching evaluations completed during the last five years from other institutions are available, you may include them in Section 33.

If this is your first year of employment and you have a teaching assignment, then you will be evaluated during the fall term. You may upload those statistics into Section 33 when they are available.

B. Peer assessments should be included here, if available.

## 11. EDUCATIONAL PORTFOLIO (if applicable)

This section is for those units where faculty are expected to develop portfolios in which they document excellence in educational scholarship, leadership and service. If you are in one of these units, include a summary of the recommended portfolio, if available. The full portfolio should be available off-line and may be requested for review.

Faculty such as Lecturers whose primary assignment is in teaching and service should include in this section **illustrative examples** of materials that document the instructional accomplishments described in Section 9. Examples may include sample exams, excerpts from syllabi, and any evidence of teaching effectiveness. Select sample materials carefully: the quality of the materials is more important than their quantity.

## 12. GRADUATE COMMITTEE ACTIVITIES

**This section will auto-populate from Graduate Information Management System (GIMS)**

**information; it is the candidate’s responsibility to check for accuracy.** If you find a discrepancy, contact the Graduate School at [graddata@ufl.edu](mailto:graddata@ufl.edu). If any corrections are made in the GIMS database, you will need to reload the template as a PDF file. You may also indicate with an asterisk on your role that a Master’s committee was a non-thesis option.

Candidate’s Role	Student	Major	Complete Date

**13. CONTRIBUTION TO DISCIPLINE/RESEARCH NARRATIVE**

In no more than 750 words explain your research/creative contribution to your discipline. Describe briefly the overall area within which your research/creative program falls and how your publications, creative work, research projects, grants, fellowships, extension works, etc., reflect your research/creative program and your achievements. There is no need to cite specific works or grants listed elsewhere in the packet. Simply reference works published, exhibited, or supported by various sources. Please address the quality of the journals in which you publish and the impact of your research/creative program.

**14. CREATIVE WORKS OR ACTIVITIES**

This area should be used to list exhibitions, concerts, performances, commissioned works, audio/visual materials developed, software written, cultivars developed, or other similar creative works, including dates. Include published critical reviews of these creative works in this section. Create a subheading for PowerPoint presentations, if applicable. Refer to instructional and informational presentations that may be delivered numerous times as “Instructional Multimedia Presentations” rather than “PowerPoint Presentations.” Do not list individually, but summarize for each year. Create a subheading for publications developed in support of web based communication and teaching, such as Webinars, if applicable.

**15. PATENTS AND COPYRIGHTS**

Include date(s) with each item and give an indication of the significance of its (their) contribution to the profession/discipline. **NOTE: If you have entered your patents and copyrights in this OPT self-service module, they will auto-populate in this section.**

**16. PUBLICATIONS**

The citation format is your choice, but entries should contain the information requested. Please include the names of all authors. Include all subcategories and if there are no entries, put “None.” Put EDIS publications in a separate section under “g. Non-refereed Publications.” Indicate that they are peer-reviewed and provide the URL. **NOTE: If you have entered your publications in this OPT self-service module, they will auto-populate in this section.**

Please use the following “key” to indicate author relationships:

Senior/principal author(s) = Underline.

Self = bold

Fellow = f

Graduate Student = g

Other = &

Post-Doctoral Associate/Fellow = p

Resident = r

The following information should be considered when compiling the publication listing:

- (1) **Refereed Journals:** A paper is considered “refereed” if it appears in a journal (or proceedings) whose papers are published only after review and acceptance by one or more independent professional expert(s) of national or international standing.
- (2) **Refereed Proceedings:** Should be listed as a separate category under Refereed Publications, and the nominee should provide a brief explanation of the review process for the proceedings. This may be entered as a footnote to the publication list.
- (3) **Non-refereed Publications:** Materials listed under non-refereed publications should include not only those journal articles which have not been refereed, but also extension publications delivered in print or via electronic format, and electronic bulletins.
- (4) When listing publications, please do not use the term “forthcoming.” Use one of the following:
  - (a) **Accepted:** A publication is defined as accepted if it has been finally accepted for publication by an editorial board or similar entity empowered to authorize publication, and will appear in print in the future.
  - (b) **In press:** A publication is defined as in press if it has been accepted for publication and has been copy-edited, or otherwise made ready for publication at a date certain.

If a publication is listed as “accepted” or “in press” in Section 16, a copy of the letter of acceptance must be included as a PDF in Section 33. Please include the name of the article on the acceptance, if it is not already stated, and indicate the approximate length of the publication in the citation.

- (c) **Submitted:** Submitted refers to a manuscript that has been submitted to a publisher for publication review. Submitted publications are to be listed in Section 33 rather than Section 16. If the publication is still in the writing

stage, please do not include it in the packet. Books that are under contract but have not yet been completed or accepted for publication are to be listed in Section 33.

- (5) Graduate students, post-docs, residents, fellows and interns listed as authors should be identified using the key.
- (6) Be sure that pagination is listed. If an article is longer than one page, give first and last page numbers.
- (7) Media releases are considered “Miscellaneous” publications.
- (8) “Reviews” are to be used for reviews you wrote. . Reviews of your work, if included, should be listed in Section 14 or Section 33.
- (9) Publication citations including words in a foreign language should have the English translation listed in parentheses.
- (10) All publications must appear in one of the categories provided.
- (11) Do not include theses and dissertations in the publication listing.
- (12) Online publications require a letter from the publisher (upload as PDF into Section 33) unless the publication can be accessed via a URL.

Categories:

- a. Books, Sole Author (Title, Publisher, Place of Publication, Date, Inclusive Pages)
- b. Books, Co-authored (Co-author(s), Title, Publisher, Place of Publication, Date, Inclusive Pages)
- c. Books, Edited (Editor, Co-editor(s), Title, Publisher, Place of Publication, Date, Inclusive Pages)
- d. Books, Contributor of Chapter(s) (Author, Co-author(s), Title of Book and Chapter, Publisher, Place of Publication, Date, Inclusive Pages)
- e. Monographs (Author, Co-author(s), Title, Series of Volume, if applicable, Publisher, Place of Publication, Date, Inclusive Pages)

- f. Refereed Publications (Author, Co-author(s), Title, Name of Journal or Publication, Volume, Date, Inclusive Pages)
- g. Non-refereed Publications (Author, Co-author(s), Title, Name of Journal, Bulletin, Circular, or other Publication, Volume, Date, Inclusive Pages)
- h. Bibliographies/Catalogs (Author, Co-author(s), Title, Publisher, Place of Publication, Date, Inclusive Pages)
- i. Abstracts (Author, Co-author(s), Title, Name of Journal or Publication, Volume, Date, Inclusive Pages)
- j. Reviews (Author, Co-author(s), Title and Author of Work Reviewed, Where Review was Published, Date, Inclusive Pages)
- k. Miscellaneous (Author, Co-author(s), Title, Source of Publication, Date, Inclusive Pages)

## **17. LECTURES, SPEECHES, POSTERS PRESENTED AT PROFESSIONAL CONFERENCES**

Include since your last promotion (not to exceed ten years) or from UF employment for tenure candidates, whichever is more recent. The entries must specify if the presentation was invited. In determining which sub-category to use, consider the target audience, location of the presentation, type of conference, etc. This section should include only presentations actually given by the candidate. Lectures, speeches, or posters presented by postdoctoral associates, graduate students, or others under your supervision should be summarized or discussed in Section 9. **Put “None” in every category and subcategory for which there are no entries. NOTE: If you have entered your lectures, speeches or posters in this OPT self-service module, they will auto-populate in this section and display only active categories.**

- a. International
- b. National
- c. Regional
- d. State
- e. Local

**18. CONTRACTS AND GRANTS SINCE THE LAST PROMOTION (NOT TO EXCEED TEN YEARS) OR FROM UF EMPLOYMENT FOR TENURE NOMINEES, whichever is more recent.**

Include all subcategories (a)-(c). If there is no data for the category, put “None”.

Information on funding amounts for both external and internal grants should include **both the percentage of your share, and the total amount of the grants**. The only roles to be included in the information are Principal Investigator, Co-Principal Investigator, Senior Personnel, Investigator, or Sponsor of Junior Faculty. **Some data has been imported from contract and grant records. If you find a discrepancy, please contact Contracts & Grants via email at [ufawards@ufl.edu](mailto:ufawards@ufl.edu). Please update, correct or add information as necessary.** Expand the charts as needed.

**a. Funded –**

1. Provide a listing of each funded grant, including the title and effective dates of the contract/grant, whether it was internally or externally funded, the amount of the award, the percentage assigned to you, the name of the external funding agency, and your role, i.e., P.I., co-P.I. (including percentage responsibility), Senior Personnel, Investigator or Sponsor. **No other roles should be included in this list.** If applicable, the list should include funding received while employed by another institution.

**List of Funding <Year> to <Year>**

<b>Role</b>	<b>Agency</b>	<b>Grant Title</b>	<b>Dates</b>	<b>Total Award</b>	<b>Candidate Allocation (\$Amount)</b>	<b>Int/Ext</b>

2. Provide an overall Summary, by Role, of the information from the list in a.1. above; include only those amounts allocated to the candidate, not the total award, divided as direct and indirect costs:

**Summary of Grant Funding, <Year> - <Year>**

ROLE	TOTAL	Direct Costs	Indirect Costs
Principal Investigator			
Co-Principal Investigator			
Investigator			
Senior Personnel			
Sponsor of Junior Faculty			
Totals			

3. A short narrative explanation of grant funding may be included.

**b. Submitted – Pending Decision** – Provide a list that includes the date of submission and other relevant information as in 18.a, including if a resubmission.

**c. Submitted - But Not Funded** – Provide a list that includes the date of submission, amount of proposal, name of agency, proposed role of nominee. Indicate any resubmissions.

### 19. UNIVERSITY GOVERNANCE AND SERVICE

This area should include information regarding the nominee’s service to the university such as membership on university, college, and department/center committees. **Put “None” under all subheadings where you have nothing to report.**

a. University

b. College

c. Department/Center

### 20. CONSULTATIONS OUTSIDE THE UNIVERSITY

Use this area for consultations that are not part of your assigned duties and responsibilities but are relevant to your scholarly career. Indicate the work performed, the organization or employer, and the date(s).

Date	Location	Work performed	Organization/ Employer

### 21. EDITOR OF SCHOLARLY JOURNALS, SERVICE ON EDITORIAL ADVISORY BOARDS, REVIEWER FOR SCHOLARLY JOURNALS

Indicate whether you were an editor, served on an editorial advisory board, or were a reviewer;

the name of the journal or publication, the date(s) of service; and the approximate amount of reviewing/editing you did. **Put “None” in every category and subcategory for which you have no entries.**

- a. Editor
  
- b. Editorial Advisory Boards
  
- c. Reviewer for Scholarly Journals
  
- d. Book Manuscripts Reviewed

## **22. INTERNATIONAL ACTIVITIES**

Briefly describe teaching, research, and service activities in light of their significance for your scholarly career, including your rationale and goals for engagement in international activities, and any outcomes or impact resulting from your international engagement. This section allows you to summarize and attach significance; do not list items, or repeat items noted elsewhere except to summarize or reference their impact.

## **23. EXTENSION PROGRAMS (for IFAS only)**

Refer to separate guidelines provided by IFAS regarding preparing this section at <http://www.personnel.ifas.ufl.edu/>

## **24. CLINICAL SERVICE, CLINICAL ACTIVITIES, OR CLINICAL PORTFOLIO**

The evaluation of clinical service should include a commentary by the department chair or division chief on assignment and performance. Documentation can include other information such as geographic extent of referral base, fiscal impact, unique clinical service, RVUs, etc.

*Note: College of Medicine faculty will insert the Clinical Portfolio here (12 page maximum) as described in the College of Medicine Promotion and Tenure Guidelines at*

*<http://facultyaffairs.med.ufl.edu/faculty-resources/tenure-promotion/2012-2013-com-guidelines-new/portfolio-clinical/>*

## **25. SERVICE TO SCHOOLS**

In 1984, the Legislature determined that service to the public schools (K-12) would be considered for tenure and/or promotion purposes. List such service in this section. Service must be related to your academic field; do not include general volunteer work.

## **26. MEMBERSHIP AND ACTIVITIES IN THE PROFESSION**

Use this area to communicate your contributions to your profession including memberships in professional societies and organizations. When listing memberships, be sure to include committee memberships and any offices held. Examples of independent professional activities would include giving testimony to a congressional committee or serving as a reviewer for grants.

All listings must indicate dates of service.

**A. MEMBERSHIPS**

- a. International
- b. National
- c. Regional
- d. State
- e. Local

**B. ACTIVITIES IN THE PROFESSION**

- a. International
- b. National
- c. Regional
- d. State
- e. Local

**27. HONORS**

List those honors, awards and prizes received as part of your professional career. **NOTE: If you have entered your honors and awards in this OPT self-service module, they will auto-populate in this section.**

- a. International
- b. National
- c. Regional
- d. State
- e. Local

**28. CHAIR'S LETTER**

**To be entered by department administrator. Candidate may respond using OPT system.**

**29. DEAN'S LETTER**

**To be entered by college administrator. Candidate may respond using OPT system.**

**30. SAMPLE LETTER TO EVALUATORS**

**To be entered by department administrator.** Note: The sample letter should be a copy of a template, not a copy of an actual letter of solicitation to an evaluator.

**31. BIO-SKETCHES OF INDIVIDUALS WRITING SOLICITED LETTERS OF**

## **EVALUATION and LETTERS OF EVALUATION**

**To be entered by department administrator.** Note: For ease of review, please upload each bio-sketch and accompanying letter in a separate PDF and note the institution in the “Comments” section.

### **32. COPIES OF THE LAST FIVE ANNUAL LETTERS OF EVALUATION**

**To be entered by department administrator.** (Do not include these in any materials sent to external evaluators.) **Candidate should verify in the OPT system that the correct letters have been entered.**

### **33. FURTHER INFORMATION**

This is a general section that allows you to include such things as letters of acceptance from publishers, a list of submitted publications, information on forthcoming books, unsolicited letters of recommendation (please indicate that these are unsolicited), committee reports, reviews of performances, as well as any additional information you wish to submit. Information should be restricted to professional accomplishments and should not include such items as “thank you” or acknowledgment letters.

Do not include vitas/resumes, publication reprints and reprint requests in the packet. These may be requested by the reviewing bodies at any level of the process.

This section may also be used for any additions or changes that need to be entered once the packet is certified for review.