

PROMOTION, TENURE, & PERMANENT STATUS
TEMPLATE 2023-24
VERSION DATE February 20, 2023

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, delete the explanatory information in the template, including this page, prior to saving it 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 be titled as shown. **Items should be listed in reverse chronological order.** If a category does not apply, please write “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://uflorida.sharepoint.com/sites/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 34 (Further Information) as PDF files. You may upload additional documents beyond those required by the template and “Guidelines” as PDF files into Section 34. 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, electronic media, 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 of 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 Faculty Relations (opt@admin.ufl.edu).

2. BRIEF DESCRIPTION OF JOB DUTIES

Briefly describe your assigned duties and responsibilities. Provide context for these responsibilities (ie. the relevance and importance to your discipline and UF)

- a. Impact of COVID pandemic / natural disasters on Job Duties. In this optional section, faculty may provide a statement regarding the impact of the COVID-19 pandemic / natural disasters on the nominee's professional life -- up to 500 words. This statement should explain how the nominee adjusted/compensated for pandemic-related difficulties impacting their research, teaching, clinics, extension or service. Please see <http://aa.ufl.edu/policies/tenure-and-promotion-information/> for more details.

3. AREAS OF SPECIALIZATION

- b. Briefly describe your area(s) of specialization. Please frame your specialty within the context of your discipline and the mission of your unit(s) and UF.

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

Applicants with two primary appointments must consolidate the assignments in one effort table to show proportional activity across both appointments. For example: an applicant with two 0.50 FTE appointments who has a 100% research assignment in one and a 0% research assignment in the other, will report a 50% research assignment. **There should be only one table in the submitted packet. Note: overload assignments are not reported in the promotion packet.**

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. If reporting effort under "Other", please provide a footnote explanation.

Department									
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 UFHR database; it is the candidate's responsibility to check for accuracy. If you find a discrepancy, contact HR

Employment Operations and Records at ufhr-employment@ufl.edu. If any corrections are made in the UFHR 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. Affiliate or, joint appointments should be listed in section 20.

Institution	Position	Dates

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

This section will auto-populate from your record in the UFHR database; it is the candidate's responsibility to check for accuracy. If you find a discrepancy, contact Faculty Relations at opt@admin.ufl.edu. If any corrections are made in the UFHR 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 or unit administrator. It is the candidate's responsibility to provide appropriate notice and to check for accuracy of the criteria in their case.

Candidates note: If your unit'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/director as to which criteria should be used for your review. The notice period varies across the University, so check with your chair/director 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. Provide context for these responsibilities (ie. the relevance and importance to your discipline and UF), a brief statement of your teaching philosophy and how it is supported by your activities, how your activities promote inclusive excellence and opportunity in the classroom, in the lab, in the field, or any space where we supervise and inspire students, and the primary educational goals and outcomes of your teaching program. Include, as appropriate, curriculum and course development, service as a graduate or undergraduate coordinator, supervised research through credit courses, and the development of new courses, educational software, and multimedia materials.

<i>Term: , Course: , Sections: Enrolled:</i>								
<i>Required Course:</i>		<i>Team Taught %:</i>		<i>Mode of Delivery:</i>				
Questions	Responded	Response Rate	Mean	IM	Dept Mean	Dept IM	College Mean	College IM
The instructor was enthusiastic about the course.		%						
The instructor explained material clearly and in a way that enhanced my understanding.								
The instructor maintained clear standards for response and availability (e.g. turnaround time for email, office hours, etc.)								
The instructor fostered a positive learning environment that engaged students.								
The instructor provided prompt and meaningful feedback on my work and performance in the course.								
The instructor was instrumental to my learning in the course.								
Course content (e.g., readings, activities, assignments) was relevant & useful.								
The course fostered regular interaction between student and instructor.								
Course activities and assignments improved my ability to analyze, solve problems, and/or think critically.								
Overall, this course was a valuable educational experience.								

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. To update your committee information please contact your departmental/unit staff. You will need to reload the template as a PDF file after updates are made in the GIMS database. If you find an error or discrepancy, contact the Graduate School at graddata@ufl.edu. You should indicate with an asterisk on your role that a Master’s committee was a non-thesis option. For active committees please indicate the anticipated completion date. When serving in a committee as a Co-Chair, please indicate the percentage level of responsibility.

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. If applicable, describe how your research supports inclusive excellence or highlights or addresses inequalities. Please address the quality of the journals in which you publish and the impact of your research/creative program. Please characterize the nature and extent of your contributions to major publications of which you are not the sole author or senior/principal author.

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. Refer to instructional and informational presentations that may be delivered numerous times as “Instructional Multimedia Presentations.” Do not list individually but summarize for each year. Create a subheading for materials 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, write “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 (use capital letters for those under the candidate’s direct supervision):

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 that 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 34. 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:** The term “submitted” refers to a manuscript that has been submitted to a publisher for publication review. Submitted publications are to be listed in Section 34 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 34.
- (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” refers to reviews written by you about someone else’s work. Reviews of your work, if included, should be listed in Section 14 or Section 34.
- (9) Publication citations of works written in a foreign language should be accompanied by an English translation 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 34) 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/SEMINARS

For cases involving a second promotion at UF, include since your last promotion. For cases involving tenure and promotion, or a first promotion at UF, include since hire at UF. Work completed prior to your hire at UF may be included in Section 34. 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. “International” refers to presentations at locations outside of the United States and/or international societies hosting the event in the United States. “Local” refers to scholarly talks provided within the UF or Gainesville community. 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 and where you were listed as a co-author but not co-presenter should be summarized or discussed in Section 9. International refers to lectures, speeches, posters presented outside of the United States or within an international society’s professional meeting hosted within the United States. **Write “None” in every category and**

subcategory for which there are no entries. **NOTE: If you have entered your lectures, speeches, or posters into the 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. SPONSORED PROJECTS

For cases involving a second promotion at UF, include since your last promotion. For cases involving tenure and promotion, or a first promotion at UF, include since hire at UF. Work completed prior to your hire at UF may be included in Section 34. In this specific case, sponsored projects from the prior institution should be put into a similarly formatted table. Include all subcategories (a)-(c). If there is no data for the category, write “None”.

Information on funding amounts for both external and internal grants and contracts should include **both the amount 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 from awards received at UF. If you find a discrepancy, please contact the Division of Sponsored Programs via email at 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, the amount of the award, the amount assigned to you (awarded/received to date and total anticipated over the duration of the project/award), 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 - Internal <Year> to <Year>

Role	Reporting Agency	Grant Title	Dates	Awarded/ Anticipated	Candidate Allocation (\$Amount)

List of Funding - External <Year> to <Year>

Role	Reporting Agency	Grant Title	Dates	Awarded/ Anticipated	Candidate Allocation (\$Amount)

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. For assistance with these values, please run the ‘Sponsored Project Portfolio Report (2007 - Present)’ report available at this path: Enterprise Analytics > Sponsored Program Information > Awards > Sponsored Project Portfolio Report (2007 - Present).

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 (if available), including if a resubmission.

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

19. SERVICE NARRATIVE

In **no more than 750 words** explain your participation in the governance processes and service to your unit(s), college, UF or external constituencies. Describe briefly how your engagement has impacted the constituencies for which the service is performed and contributed to inclusive excellence and opportunity. Include information on how your service connects to or informs your research, teaching, and/or profession and your rationale and goals for engagement. This section allows you to summarize and attach significance to your service activities; do not list items, or repeat items noted elsewhere except to summarize or reference their impact.

20. UNIVERSITY GOVERNANCE AND SERVICE

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

- a. University
- b. College
- c. Department/Center

21. 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

22. EDITOR OF SCHOLARLY JOURNALS, SERVICE OR 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. For book manuscript reviews, please indicate the length of the reviewed work. **Write “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

23. INTERNATIONAL ACTIVITIES

Briefly describe your international 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 to your international work; do not list items, or repeat items noted elsewhere except to summarize or reference their impact.

24. EXTENSION PROGRAMS (for IFAS only)

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

25. 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/>*

26. 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.

27. 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, inclusive years, and any offices held. Examples of independent professional activities would include giving testimony to a congressional committee, serving on professional society leadership / programming committees or serving as a reviewer for grants. All listings must indicate dates of service. Write “None” under all subheadings where you have nothing to report.

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

28. HONORS

List those honors, awards and prizes received as part of your professional career. Write “None” under all subheadings where you have nothing to report. **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

29. CHAIR’S LETTER

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

30. DEAN’S LETTER

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

31. SAMPLE LETTER TO EVALUATORS

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

32. BIO-SKETCHES OF INDIVIDUALS WRITING SOLICITED LETTERS OF EVALUATION and LETTERS OF EVALUATION

To be entered by department/unit 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. In the bio-sketch please indicate whether the evaluator was recommended by the candidate or Chair.

33. COPIES OF THE LAST FIVE ANNUAL LETTERS OF EVALUATION

To be entered by department/unit 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. Note: Do not include mid-career review report.**

34. FURTHER INFORMATION

This is a general section that allows you to include any additional information you wish to include, such as letters of acceptance from publishers, a list of submitted publications, information on forthcoming books, unsolicited letters of recommendation (duly labeled as such), and committee reports. 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.

Do not include book contracts.

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