Academic Year 2023-24 Faculty Success Portfolio Technology Handbook

→ Technological Assistance

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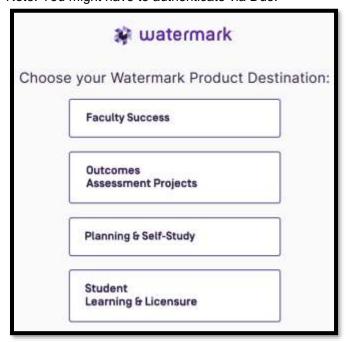
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Accessing your Portfolio

- 1. Go to http://neiuport.neiu.edu
- 2. Use your NEIUport username and password
- 3. Click on Watermark



4. From the Navigator tiles select **Faculty Success**Note: You will be prompted to login with your NetID email, e.g. ksbeyer@neiu.edu.
Note: You might have to authenticate via Duo.



5. You will be brought to the Faculty Accomplishments page.

General Overview

Faculty Success allows faculty to document their accomplishments anytime they choose to log into the system. This allows you to keep your accomplishments and activities up-to-date and not having to wait for a template to be opened. Within Faculty Success there is a module called RPT, Review, Promotion & Tenure.

The RPT module is the only item which is date sensitive. This module is what will prompt you and allow you to complete the narrative part of your portfolio. Narratives can be copied and pasted from Google Docs or Microsoft Word into Faculty Success if want to work on these prior to this becoming available to you.

The basic concept of each section is that you fill out a form, upload documentation, and the system will generate a record for you pertaining to that activity. Some DACs (Department Application of Criteria) might place things under different sections; however, the important thing is that things are documented. DPCs, Chairs, etc. will be informed of this universal setup and how it might differ from your DAC.

DACs will be uploaded by the Faculty Success Administrators and be linked in your annual activity report.

Courses will be pre-loaded for you approximately 4 weeks after a semester begins. Course Evaluations since Fall 2020 to present are uploaded for you and will be uploaded 4-7 days after grades are posted. Course Evaluations prior to Fall 2020 will **need to be manually uploaded based on files personally retained when using SmartEvals.**

The system will generate links for you so you do not have to manually link anything and tables and citations will be automatically generated based on information you enter into the activity forms.

The end result is that all the activities you enter into Faculty Success will generate an Annual Activity Report. This report will be automatically generated for you by the Faculty Success Administrators based on dates provided to them from Academic Affairs for the years that need to be represented in your portfolio.

What Semesters are included in my ePortfolio?

Reminder: The Annual Activity Report will be auto generated for you based on the dates the Faculty Success Administrators receive from Academic Affairs.

As a general rule...

If you are creating a Year One your portfolio only incudes one semester so the Fall 2023 semester.

If you are creating a Year Two your portfolio includes three semesters so Fall 2022, Spring 2023, Summer 2023 (if applicable) and Fall 2023.

If you are creating a Year Three, Year Four or Year Five your portfolio includes one calendar year Spring 2023 through Fall 2023.

If you creating your tenure/associate professor portfolio it requires that all evaluation periods (years 1-6) are available for review.

See Chart on page 6 about what materials are needed

Changes to your Portfolio after it has been submitted to your DPC

Once the evaluation process has begun, you may be requested by your DPC to add/or edit your portfolio.

Within the RTP module there is an option for DPCs to request changes that first need to be approved by Effie Kritikos (University Contract Administrator) and Nancy Matthews (UPI President) about the request. The faculty member needing to make changes will be notified via Faculty Success automated messages of Effie's & Nancy's decision along with the time frame for making the requested changes. After the changes are made simply resubmit your portfolio so your DPC can do one more review before it goes to the department chairperson.

Any future requests (after DPC changes) for portfolio changes must be approved by Effie Kritikos which is built into the RPT module. The conditions under which materials can be added to the evaluation are referenced in Article 25.04.D.3 of the UPI Contract.

Observations and Evaluations

Teaching Professionals must include two <u>signed</u> peer observations and one <u>signed</u> chair observation in their portfolios.

Resource Professionals must include two signed peer evaluations of their primary duties.

These observations need to be scanned and uploaded into the Peer and Chair Observation section.

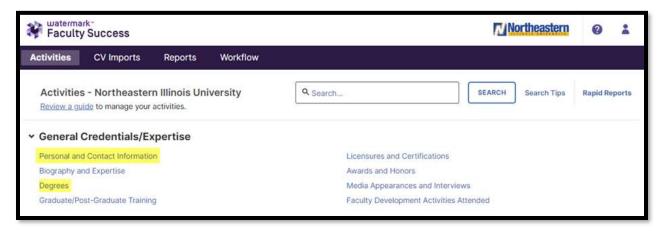
Contact your chair if these observations have not occurred or have not been scheduled. Student evaluations are required and automatically uploaded into your portfolio per applicable minimum enrollments per the faculty contract. More information on course evaluation processes can found by clicking on the following link, Course Evaluations | NEIU. Reminder: Results of your student evaluations will be released 3 days after the university grades due deadline and uploaded by your Faculty Success Administrators to your profile in Faculty Success within 5 business days. Note: If you are going up for tenure and promotion or Promotion to Full or PAI your current Fall evaluations will not be included. Department chairs (and DPC members) have been asked to make sure that you receive your signed copies of peer and chair observations by the end of the Fall semester for those in the retention cycle. It will be helpful to remind them of your portfolio deadlines.

Desire2Learn

To give your reviewers access to your Desire2Learn site, send an email to Kenny Beyer by one week prior to the due date. In your email message identify the courses by their D2L ID#, e.g. BIO_100_1_201910 that you wish to include in your portfolio. No more than three different courses should be made available to your reviewers. The inclusion of the D2L link does not eliminate your need to submit the required instructional materials identified in the contract or in your specific Application of Criteria. Within Faculty Success for the D2L link you will need to put the login URL, http://neiu.desire2learn.com, in the Instructional Technology area.

General Credentials/Expertise

Within this section of your portfolio verify and complete the **Personal and Contact Information** and the **Degrees** section.



Other sections can be completed as necessary to document those activities.

Career Information

Within this section of your portfolio you have been a chairperson or any other non-teaching type Form D assignment would go under Administrative Assignments.



Other sections can be completed as necessary to document those activities.

Basic Portfolio Setup

	<u>1st Year</u>	2nd Year	<u> 3rd - 5th Year</u>	<u>Tenure</u>	<u>Full Prof</u>	<u>PAI</u>
Content Needed, e.g. Syllabi	Fall Semester	Copy 1st year and add Spring, Summer (if applicable), Fall	Spring, Summer (if applicable), Fall of current calendar year	Everything since the beginning of time including the current semester.	Since Tenured including the current semester.	Since becoming Full Professor last PAI including the current semester.
Signed Peer/Chair Observations	2 Peer/1 Chair	2 Peer/1 Chair plus your first year observations	2 Peer/1 Chair	Everything since the beginning of time including the current semester.	2 Peer/1 Chair for the current semester.	2 Peer/1 Chair for the current semester.
Course Evaluations	Fall Semester	Fall, Spring, Summer (if applicable), Fall	Spring, Summer (if applicable), Fall of current calendar year	Everything since the beginning of time; not the current semester.	Since Tenured, but not the current semester.	Since becoming Full Professor last PAI not the current semester
Narratives	Fall Semester	Overall Experience from Fall, Spring, Fall	Reflective of proper year	Reflective of the entire tenure process	Since Tenured including the current semester.	Since becoming Full Professor last PAI including the current semester.
Submit portfolio	by Thursday, January 4, 2024 @ 11:59 pm		by Thursday, O	ctober 5, 2023	@ 11:59pm	
Final Step to Notify the CTL	Email ctl@neiu.edu that Portfolio has been submitted					

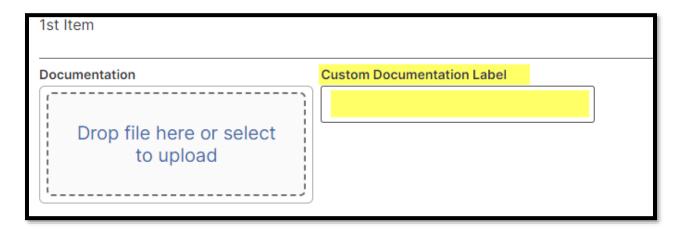
Teaching/Mentoring

Within this section of your portfolio you will need to complete the Schedule Teaching (Librarian Primary Duties, if appropriate) and Peer and Chair Observations sections.



Your courses will need to be updated with syllabi, instructional materials and some evidence of instructional technology. Note: You can upload more than one file and/or web addresses; however, all will say Instructional Materials/Technology depending on where it is documented.

By default, your instructional Materials are labeled "Instructional Materials" and Instructional Technology is labeled "Instructional Technology" If you wish to have these display a specific name please complete the field called **Custom Documentation Label**. Example label could be Lecture PowerPoint, Midterm Exam, Discussion Prompt, etc. The custom documentation label will be what is displayed to your reviewers.



The custom documentation label option is available throughout the Accomplishment and Activities of Faculty Success and is available in Research and Service sections as well.

Additional Activities can be documented by clicking on the appropriate link:

- Directed Student Learning (theses dissertations),
- Mentoring
- Teaching Innovation and Curriculum Development
- Non-Credit Instruction

Note: If you assist with student advising document these details within your teaching or service narrative based on your DAC and/or Form D.

Scholarship/Research

In this section of your portfolio you will more than likely have presentations and publications. You can document things that are in-progress and those that have been completed. In your narrative, if you DAC says you must have x category 1s, y category 2s make sure you mention those facts. The actual details and documentaion will be in your annual activity report.

Scholarship/Research

Publications

Presentations (excluding Fine Arts Exhibits and Performances)

ABET Vitae

Contracts, Fellowships, Grants and Sponsored Research

Exhibits and Performances

Intellectual Property (e.g., copyrights, patents)

Research Activity

• Research Publication

- Books
- o Book Chapters
- o Book Review
- o Case
- o Conference Proceeding
- Instructional Material
- Journal Article
- Magazine/Trade Publication
- Newsletter
- Newspaper Article
- Reference Article
- Software
- Technical Report
- Textbook
- Other

Presentations (excluding Fine Arts Exhibits and Performances)

- Demonstration
- o Exhibit
- Keynote/Plenary Address
- Lecture
- Oral Presentation
- Paper
- o Poster
- Others

*Presentations include the scopes of:

- International
- National
- o Regional
- o State
- Local

• Exhibits and Performances

- o Artist in Residence
- Dance Performance
- Exhibition
- o Film
- o Film Screening
- Music Performance
- Production
- o Radio
- Television
- o Theatre Performance
- Other

Contracts, Fellowships, Grants, Sponsored Research

- o Contract
- Fellowship
- Grant
- Sponsored Research

*These can be awarded at the following levels:

- Northeastern Illinois University
- Local
- State
- Federal
- Private
- Other

Service



In this section of your portfolio you can document your service to

NEIU	Professional	Public
Department College University	Adjudicator Attendee, Meeting Board of Advisors Board of Directors Chairperson Committee Chair Committee Member Conference-Related Editor Editorial Review Board Member Interaction with Industry Officer Prepare/Grade Certification Exams President Program Coordinator Program Organizer Reviewer/Referee Secretary Session Chair Task Force Chair Task Force Member Track Organizer Treasurer Vice President Workshop Organizer Other	Adjudicator Board Member Board of Directors Chair Committee Member Guest Speaker Judge Member Organizer Participant President Volunteer Other

AACSB Societal Impact Designations

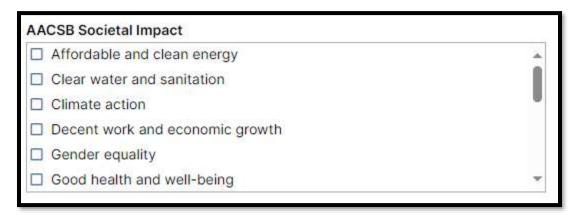
This section only pertains to faculty who teach in the CBT and belong the accounting, business law, finance, marketing, and management departments.

A new AACSB accreditation requirement is to report is how many courses, publications or presentations impact society. For each of these activity types starting with the Fall 2023 you must tag/associate these activities (if appropriate) with the appropriate impact measures.

There are currently 17 possible societal impact measures based on the United Nations Sustainable Development Goals.

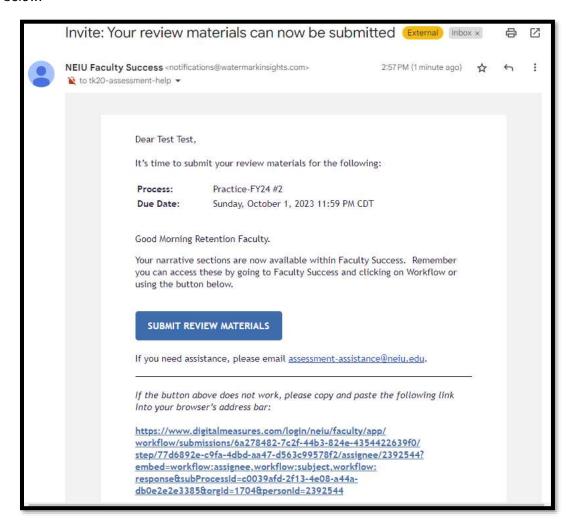
- No poverty
- Zero hunger
- Good health and well-being
- Quality education
- Gender equality
- Clear water and sanitation
- Affordable and clean energy
- Decent work and economic growth
- Industry, innovation and infrastructure
- Reduced inequalities
- Sustainable cities and communities
- Responsible consumption and production
- Climate action
- Life below water
- Life on land
- Peace, justice and strong institutions
- Partnerships

When you are documenting an activity, you will have a box similar to the one below that will allow you check one or more societal impact measures to associate with that particular activity.



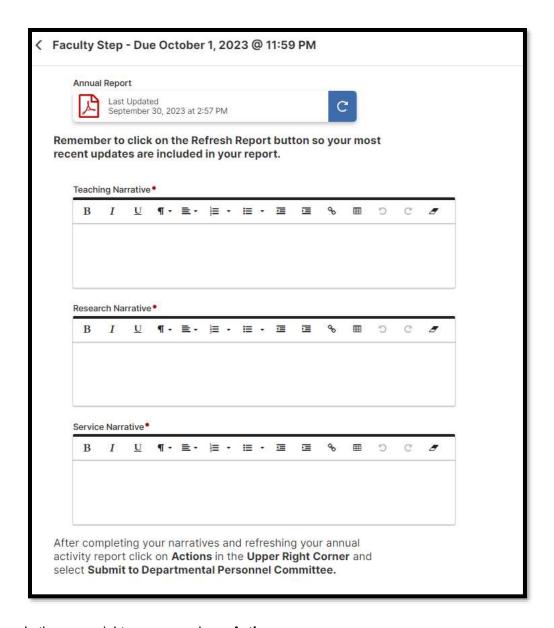
Writing Your Narrative

Before your portfolio can be formally submitted you need write three narratives. This is the only part of the portfolio process that is available to you whenever. You will receive an email looking similar to this one below:

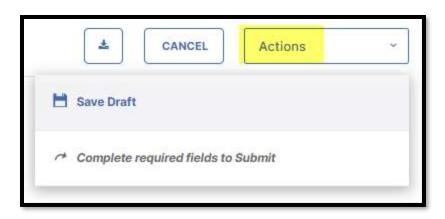


Alternatively, you can access your narrative by going the **Workflows** menu button. Within the **inbox** you will see an item for you complete, e.g. Retention Portfolio, or Promotion – *Your last name*. Click on that item.

You will then have three text boxes open for each narrative you will need to complete. teaching, research and service narratives. (see screenshot on next page).



In the upper right corner, you have Actions



. You can **Save Draft** at any time if you want to work on in stages. If you have things to complete it will not allow you to submit until you have completed everything.

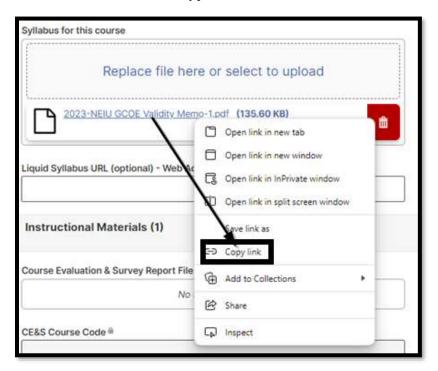
If everything has been completed the second option will switch to Submit to _____, which in this situation in stage one will be Submit to Department Personal Committee.

Inserting Links into Narratives

If you want to reference something you have uploaded in your activities you can insert a link to narratives.

Part I: Copy the link

Within the activities area, find the item you want to link to your narrative and right click/secondary click/cmnd click and select **Copy Link**.



Part II: Inserting Link into Narrative

- 1. Go to Workflows
- 2. Click on the task, e.g. Retention Portfolio
- 3. Click on Insert Link in the HTML toolbar



- 4. Paste the link form Part I
- 5. Type your *preferred* text to show for the link
- 6. Select Open in a new tab
- 7. Click on Insert

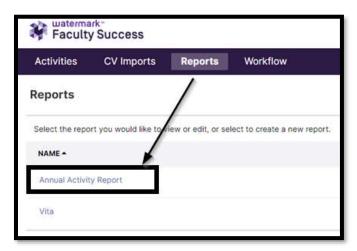
Previewing Your Annual Activity Report

A common request among faculty using Faculty Success is how their annual activity report will be presented to their reviewers. You can run your own annual activity report to preview this file.

- 1. Log on to Faculty Success
- 2. Click on Reports in the horizontal navigation bar.



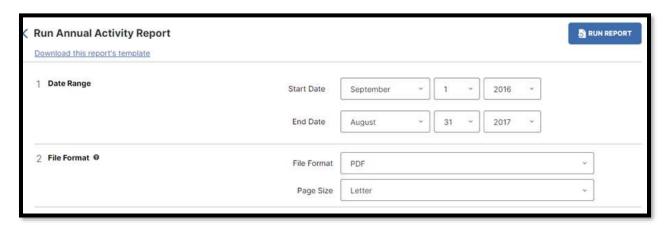
3. Click on the Annual Activity Report link



4. Verify the following parameters:

Date Range is for the time range you are being evaluated. **Note**: September 1 = Fall Example: if year 2 would select September 1, 2022 to December 31 2023

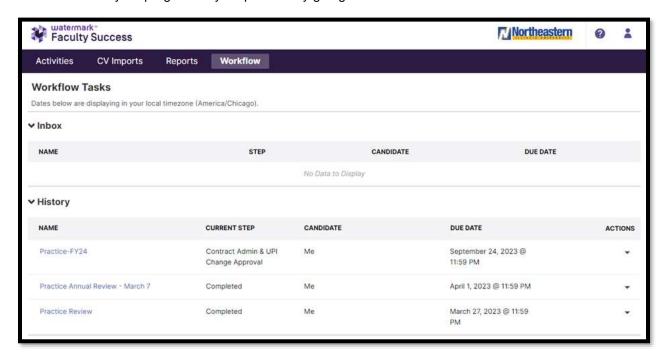
File Format: You need to select **PDF**; Microsoft Word does not always render links correctly and causes an error at times.



5. Click on Run Report in upper right corner. By default, it will go into your Downloads folder.

Monitoring Your Portfolio Progress

You can monitor your progress of your portfolio by going to the Workflow tab.



If an item is in your **Inbox** this an active task for you to do, e.g. make changes based on DPC request and approved by Contract Admin.

If items are under **History** this is where you can see what current stage and the date is due for it move to the next stage.

Making DPC Requested Changes

You will receive an email to **Start Your Response** and have an alert in your Faculty Success Workflow Inbox in which the step will be called **Faculty Complete DPC Requested Changes**.



If you have made any changes to your Accomplishments and Activities you will need to refresh your Annual Report by clicking the **Refresh** button.



You will get the pop-up warning that after you refresh you cannot go back to an older version. The warning states:



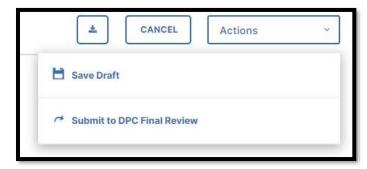
This action will update the attached report based on the information available under Activities. To preview this report's updated output, go to Reports and run the report from there first. Refreshing the report's contents here cannot be undone.

Are you sure you want to proceed?
You more likely will click on **Yes** because you have made requested changes. Note:

When you refresh the time stamp will update.

If you need to make updates to your narratives, you will need to follow the direction and copy and paste within Faculty Success or original source, e.g. Microsoft Word or Google Docs.

When all changes are complete click on Actions then Submit for to DPC Final Review.



You will get a pop-up to confirm you are ready for the portfolio to move the next stage in which you click on **Yes** to confirm that you want it to proceed to the DPC Final Review

Most likely this will be the last time you make changes to your portfolio as there very very few exceptions where you can make changes during any other review stage.

Acknowledging Reviewer Recommendations

At the conclusion of each stage you must *acknowledge* you have read the reviewer(s) recommendation of your request to be retained and/or promoted. Remember this is acknowledging that you read the completed form and/or letter; it does not mean that you necessarily agree with the recommendation, but that you have taken the time read it. At most stages of the review process you have ability to appeal a negative recommendation; however, the first step is to acknowledge what was said by the reviewer.

An example of the DPC Review is below:

Faculty Acknowledgement of DPC Review				
By typing my full legal name and clicking on the Submit to Department Chair Action button in the upper right corner counts as my legal signature acknowledging that I have read the Form D and narratives completed by my departmental personnel committee.				
Type your Full Legal Name*				
After typing your signature, click on the Actions button in the Upper Right Corner and select Submit to Department Chair - Initial Review.				

Acknowledging is completed by typing your Full Legal Name.

The last step of the review stage is to go to **Actions** select Submit to *next stage* and agree to the pop-up to go to the next stage by clicking on **Yes**.

DPC (Departmental Personnel Committee) Portfolio Process

	1st & 2nd Year	3rd - 5th Year	<u>Tenure</u>	Full Professor	PAI
Step 1	By noon on Friday, January 5, an automated email from Faculty Success will give DPC members rights to each faculty member's portfolio to begin the evaluation process.	By noon on Friday, January 5, an automated email from Faculty Success will give DPC members rights to each faculty member's portfolio to begin the evaluation process.	By noon on Friday, October 6, an automated email from Faculty Success will give DPC members rights to each faculty member's portfolio to begin the evaluation process.	By noon on Friday, October 6, an automated email from Faculty Success will give DPC members rights to each faculty member's portfolio to begin the evaluation process.	By noon on Friday, October 6, an automated email from Faculty Success will give DPC members rights to each faculty member's portfolio to begin the evaluation process.
Step 2	Evaluate your colleagues' portfolios including any changes by Monday, January 15 Note: The Department Chairperson receives portfolio access on Tuesday, January 16	Evaluate your colleagues' portfolios including any changes by Thursday, January 18 Note: The Department Chairperson receives portfolio access on Friday, January 19	Evaluate your colleagues' portfolios including any changes by Monday, October 23 Note: The Department Chairperson receives portfolio access on Tuesday, October 24	Evaluate your colleagues' portfolios including any changes by Monday, October 23 Note: The Department Chairperson receives portfolio access on Tuesday, October 24	Evaluate your colleagues' portfolios including any changes by Monday, October 23 Note: The Department Chairperson receives portfolio access on Tuesday, October 24
Step 3 Requested Changes Process	Once the evaluation process has begun, you may be requested by your DPC to add/or edit your portfolio. Within the RTP module there is an option for DPCs to request changes that first need to be approved by Effie Kritikos (University Contract Administrator) and Nancy Matthews (UPI President) about the request. The faculty member needing to make changes will be notified via Faculty Success automated messages of Effie & Nancy decision along with the time frame for making the requested changes.				
Step 4 Changes Complete	After the changes are made simply resubmit your portfolio so your DPC can do one more review before it goes to the department chairperson				

2023-2024 Faculty Success Faculty Portfolio Technology Handbook Department Chair Portfolio Process

	1st & 2nd Year	3rd - 5th Year	<u>Tenure</u>	Full Prof	PAI
Step 1	On Tuesday, January 16, an automated email from Faculty Success will give the dept chair rights to each faculty member's portfolio	On Friday, January 19, an automated email from Faculty Success will give the dept chair rights to each faculty member's portfolio	On Tuesday, October 27, an automated email from Faculty Success will give the dept chair rights to each faculty member's portfolio	On Tuesday, October 27, an automated email from Faculty Success will give the dept chair rights to each faculty member's portfolio	On Tuesday, October 27, an automated email from Faculty Success will give the dept chair rights to each faculty member's portfolio
Step 2	Evaluate your department's portfolios	Evaluate your department's portfolios	Evaluate your department's portfolios	Evaluate your department's portfolios	Evaluate your department's portfolios
Step 3 Chair process complete	In order to keep process moving smoothly and efficiently an automated email from Faculty Success will give the Dean rights to each faculty member's portfolio so they can then start the review process on Friday, February 2.	In order to keep process moving smoothly and efficiently an automated email from Faculty Success will give the Dean rights to each faculty member's portfolio so they can then start the review process on Wednesday, February 14.	In order to keep process moving smoothly and efficiently an automated email from Faculty Success will give the Dean rights to each faculty member's portfolio so they can then start the review process on Friday, November 17.	In order to keep process moving smoothly and efficiently an automated email from Faculty Success will give the Dean rights to each faculty member's portfolio so they can then start the review process on Friday, November 17	In order to keep process moving smoothly and an automated email from Faculty Success will give the Dean rights to each faculty member's portfolio so they can then start the review process on Friday, November 17.

Note: Chairs may **ONLY** request additional documentation which would be included in the transmittal envelope. Article 25.04.D.3

University Evaluation Schedule Dates

STAGE	PROMOTION to PROFESSOR			
	PAI TENURE with PROMOTION to ASSOCIATE	RETENTION YEARS 1 - 2	RETENTION YEARS 3+	
Request Verification	Friday, Sept 1, 2023			
Receive Verification	Friday, Sep 8, 2023			
Notify CTL by midnight you are finished	Thursday, October 5, 2023	Thursday, January 4, 2024	Thursday, January 4, 2024	
CTL to DPC	Friday, October 6, 2023	Friday, January 5, 2024	Friday, January 5, 2024	
DPC to Chair w/ Copy to Faculty	Tuesday, Oct 24, 2024	Tuesday, Jan 16, 2024	Friday, Jan 19, 2024	
Chair to Faculty	Monday, November 6, 2024	Monday, January 22, 2024	Friday, February 2, 2024	
Request DPC/Chair Reconsideration	Friday, November 10, 2024	Friday, January 26, 2024	Friday, February 9, 2024	
Chair and/or DPC Reconsideration to Faculty & Dean	Friday, November 17, 2024	Friday, February 2, 2024	Wed, February 14. 2024	
Dean to Faculty	n/a	Friday, February 9, 2024	Wednesday, Mar 6, 2024	
Request Dean Reconsideration	n/a	Wednesday, Feb 14, 2024	Friday, March 8, 2024	
Dean to Provost w/ Copy to Faculty	Friday, January 12, 2024	Wednesday, Feb 21, 2024	Friday Mach 15, 2024	
Provost to UPC	Friday, January 26, 2024	Monday, Feb 26, 2024	Friday, March 22, 2024	
UPC to Provost w/ Copy to Faculty	Friday, February 16, 2024	Monday, March 11, 2024	Tuesday, April 12, 2024	
Request UPC Reconsideration	Wed., February 21, 2024	Friday, March 15, 2024	Friday, April 15, 2024	
UPC Reconsideration to Provost w/ Copy to Faculty	Friday, March 1, 2024	Friday, March 22, 2024	Friday, April 22, 2024	
President to Faculty → President to Faculty →	For Promotion & PAI Wednesday, May 1, 2024 For Tenure with Promotion to Associate Friday, May 31, 2024	Friday, March 29, 2024	Monday, May 13, 2024	