

# **Guide to TRT Promotion at WPI: Associate to Full Teaching or Research Professor<sup>1</sup>**

## **Information for Associate Teaching or Research Professors, their Mentoring Teams, Nominators and Advocates, Professional Associates, and External Reviewers**

A publication of the WPI Committee on Appointments and Promotions and the Office of the Provost, with initial development assistance of the WPI ADVANCE team.

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<sup>1</sup> Initial draft written by ADVANCE Working Group 5 in summer 2020: Chrys Demetry (ADVANCE liaison), Glenn Gaudette (COG member), Scott Jiusto (Associate Professor), Diane Strong (Department Head), Suzanne Scarlata (COAP member). COAP reviewed and updated in Spring 2021 and Fall 2022.

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## Annual Letter from the Committee on Appointments and Promotions

### Dear Associate Teaching or Research Professor and Promotion Process Stakeholders:

Welcome to the “Guide to TRT Promotion at WPI: From Associate to Full Teaching or Research Professor.” This is a publication distributed to WPI’s associate TRT professors and to those who play key roles in their professional development. Our goal is for all to have equal access to best practices and guidance. We welcome comments from all about this guide and how it might be improved in the future.

**What’s in it for you?** This guide provides an overview of WPI’s process for promotion from associate to full professor for TRT faculty and resources to assist key actors in fulfilling their respective roles. We write foremost to “you,” the Associate TRT faculty member building toward and ultimately applying for promotion, because almost all of the information included here is relevant to your success. We hope, however, that other stakeholders will benefit from seeing things from your perspective. These include those closely connected with the process (Provost, Deans, Department Heads, mentoring teams, and eventually promotion Nominators and Advocates, letter writers) as well as the WPI Board of Trustees, administration, and faculty more generally. In some places we will speak directly to these different stakeholders, and link to relevant policies and other resources, again in the hope that WPI’s promotion process will be thoughtful, transparent, and well understood by all parties.

**An Overview:** As you’ll see in the table of contents, the Guide covers a lot of ground. There is information relevant to all stages of an Associate TRT Professor’s professional development, including:

- 1. Building Toward Promotion Over Time:** Reflecting the growing emphasis at WPI on supporting the professional development of associate teaching or research professors, information is provided to help these faculty and their department heads and mentoring teams think about strategies for growth and development, such as crafting a professional development plan, building a portfolio, maintaining a COAP-required CV, etc.
- 2. Applying for Promotion:** Information is provided about choosing a Nominator and Advocate, selecting Professional Associates to support your case, crafting your promotion rationale and dossier, etc.
- 3. Sample Dossiers and Links to Key Policies and further information** offer examples from successful candidates and important policies of the WPI Faculty underpinning promotion processes.

### Key Deadlines for Promotion Applications

Unless otherwise indicated, all communications to satisfy key deadlines are to be emailed to the Faculty Governance Coordinator, Penny Rock ([prock@wpi.edu](mailto:prock@wpi.edu)). Please note that these deadlines are for Teaching and Research Track Associate Professors – different dates apply for tenured associate professors. If you have questions about the promotion process at any time, please reach out to the COAP Chair or any COAP member. **Note: if there is a general time frame for something being due to the Faculty Governance Office (e.g., mid-early June), the specific deadline will be updated each year and**

***communicated by the Faculty Governance Office. The general time frame is to give you a sense of when things are due without committing to a date that may fall on a weekend.***

**Late C Term/Early D Term:** Open COAP Promotion Information Sessions (slides posted after)

**Apr 15:** Nominator (Department Head or Program Director) needs to submit name of promotion candidate to Faculty Governance Coordinator ([prock@wpi.edu](mailto:prock@wpi.edu)).

**May 1:** Candidate submits name of Advocate and list of 6 Professional Associates to Faculty Governance Coordinator ([prock@wpi.edu](mailto:prock@wpi.edu)).

**May 1:** Nominator submits list of External Reviewers for Research Track candidates.

**July 1:** Candidate submits promotion dossier to Penny Rock ([prock@wpi.edu](mailto:prock@wpi.edu)).

**Summer:** Faculty Governance Coordinator sends Professional Associates and External Reviewers (for Research Track candidates) a cover letter, candidate's dossier, and WPI promotion criteria. Also sends survey to former students.

**Aug 15:** Letters due from Professional Associates & External Reviewers (for Research Track candidates). Formal Nomination Letter (by Nominator) and Advocate Letter (Optional) also due. All to Faculty Governance Coordinator ([prock@wpi.edu](mailto:prock@wpi.edu)).

**Beginning of A term:** Candidate submits dossier updates, if any.

**A & B term:** Joint Promotion Committee meets for initial discussion of case and supporting materials and will request Nominator secure additional information if needed.

**Beginning of B term:** Candidate submits further dossier updates, if any.

**B term:** If needed, Joint Promotion Committee meets for second case review.

**A or B term:** when all JPC members are ready, a vote is conducted. After the vote, JPC writes a promotion case recommendation letter.

**End of B Term:** Joint Promotion Committee submits final letter to the Dean and Provost. Dean and Provost review cases.

**January:** Provost may meet with committee to discuss questions or differences of view.

**February:** Provost's positive recommendations are reviewed and acted on at Board of Trustees winter meeting. Provost's negative recommendations are not reviewed by the Board of Trustees. Provost notifies candidates of promotion decision following Board meeting.

In all, whether you are an associate teaching or research professor at WPI or one of the many people who will play a role in their successful continuing development and promotion, we hope you will find the information here helpful. Our goal is for every one of our WPI faculty colleagues to thrive and advance in rank in an enjoyable, fulfilling, and timely fashion.

Sincerely,

The Committee on Appointments and Promotions (COAP)

## Key Contacts

- Faculty Governance Coordinator: Penny Rock ([prock@wpi.edu](mailto:prock@wpi.edu), x5135)
- COAP website: <https://www.wpi.edu/offices/faculty-governance/coap>

A list of the current COAP member is on the COAP website, including the Chair and Secretary.

## Annual Letter from the Provost

### Dear Associate Teaching or Research Professor and Promotion Process Stakeholders:

Welcome to the “Guide to TRT Promotion at WPI: From Associate to Full Teaching or Research Professor.” I am happy that you are looking to learn more about the promotion process from Associate to Full. Promotion from Associate to Full Teaching or Research Professor is an important milestone and signals continued professional growth for a faculty member.

As you begin your journey through this guide, I wanted to remind everyone of WPI’s Promotion Criteria. For our **teaching professors**, the faculty handbook states: “To be considered for promotion to teaching professor, an associate teaching professor must have demonstrated considerable professional growth and development of qualities of leadership. This usually requires at least five years as an associate teaching professor. The candidate must have recent accomplishments of high quality in teaching as well as demonstrated leadership in some aspect of teaching. This leadership must be recognized by peers within WPI, and acknowledgement by external peers would be viewed favorably.” For our **research professors**, our faculty handbook states: “To be considered for promotion to research professor, an associate research professor must have demonstrated considerable professional growth and development of qualities of leadership. This usually requires at least five years as an associate research professor. The candidate must have recent accomplishments of high quality and demonstrated leadership in scholarship/creativity. This leadership must be recognized by peers within WPI, and by knowledgeable people outside WPI. Scholarship and/or creativity can take many forms.”

One particularly important aspect of promotion from Associate to Full Teaching or Research Professor is that there is an expectation of leadership in some way. At WPI, we are committed to thinking about leadership in a variety of ways. We also acknowledge and pay attention to the potential effects that different biases may play in a candidate’s career and promotion evaluation.

I encourage you to read through this Guide carefully and reach out to members of COAP if you have any questions. If you are considering promotion, I wish the best of luck preparing for this important milestone. If you will be playing a key role in a promotion case, thank you for taking the time to learn more about the promotion process at WPI and for the important role you will play for the candidate.

Sincerely,



Wole Soboyejo  
Provost and Senior Vice President

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## A. Professional Development from Associate to Full Teaching/Research Professor

### A.1 Why Pursue Promotion to Full Teaching/Research Professor?

Do you have doubts about whether pursuing full professor is worth it? If you are actively doubting the benefit of becoming a full professor, here are some things to consider:

- In many ways, promotion is an acknowledgement of your natural growth as a professional, rather than a goal in itself. Continuing your career involves taking on new and larger tasks, e.g., important committees, leadership positions, more departmental responsibilities, mentoring of junior faculty, etc. You will grow in expertise in a variety of ways by simply doing the things that need to be done. Promotion acknowledges this professional growth. Setting promotion as a goal helps you guide your growth in productive ways. It's typically not a separate goal, but rather a natural outcome of the variety of things you take on after becoming an Associate professor.
- WPI has recognized that promotion is a natural milestone in the developmental path of a career as a faculty member. Thus, in most cases, faculty are expected to become a full professor sometime after reaching the Associate professor rank. Promotion is no longer considered as a special case for exceptionally productive faculty.
- Being a full professor opens more opportunities. This is partially because full professors are recognized as capable and accomplished and may be encouraged to pursue opportunities where there are great possibilities but not necessarily immediate outcomes.
- Finally, remember that the path to full professor may take many detours and can proceed at different rates. You may initially not set full professor as a goal; you may feel a need to rebalance your life at some point; you may have various family or caregiving obligations that take your attention; you may become dedicated to social justice or personal development activities, etc. None of these preclude becoming a full professor. The choice is not either/or and the path is yours to define, ideally working with the mentor group you have selected.

### A.2 Working Toward Promotion Over Time

#### A.2.1 Creating a Mid-Career Vision and Professional Development Plan

*If you don't know where you are going, you'll end up somewhere else. – Yogi Berra*

Without a plan that helps you prioritize and say no to some opportunities, you may end up “doing doing” without all that action and effort adding up to a coherent story that you can tell about your professional growth, contributions, and leadership. For this reason, we recommend that Associate TRT Professors create a Professional Development Plan (PDP) within a year or two after becoming an Associate TRT Professor, to serve as a roadmap for their next career phase. Specialists in academic careers recommend 5-year plans to maintain vitality, and WPI encourages faculty to craft rolling 5-year PDPs.



Creating and regularly refining a PDP addresses common challenges and barriers for new Associate TRT Professors:

- Goal of promotion to Associate TRT Professor has been reached – what next?
- Multiple paths to choose from – which to take?
- Increase in responsibilities and overall workload
- Exhaustion: how to balance responsibilities of home, work life, self-care
- Deeper questions of meaning, impact, legacy

Those who use PDPs discover numerous benefits:

- A useful framework for conversations with department heads and mentors
- A mechanism for prioritizing and for accountability-- to say no to requests and opportunities that don't support your vision and goals
- More agency, self-determination, and satisfaction in identifying and pursuing work that's closely aligned with personal and professional values
- More strategic and integrative thinking about choices—for example, particular service activities could contribute insights that also resonate with your teaching or scholarship.

Creation, implementation, and ongoing refinement of a professional development plan (PDP) is the centerpiece of mentoring for Associate TRT Professors at WPI. A goal of the WPI PDP is to empower mid-career faculty to ground their work in their values, fully unleash their creativity and to pursue passions and dream projects across all types of faculty work (teaching, multiple forms of scholarship, leadership, service) in ways that will benefit departments, programs, and the institution and also be promotable.

WPI's PDP template can be found on the ADVANCE Canvas site and is organized in the following manner:

### **Creating an exciting vision**

1. Reflecting on values and passions
2. Envisioning this career phase

### **Goal setting**

3. Identifying opportunities in promotion criteria
4. Considering department and institutional context
5. Setting long-term and short-term goals for scholarship, teaching, leadership/service

### **Professional development and mentoring**

6. Assessing skills needed to reach goals
7. Creating a mentoring and advocacy network

PDP workshops are hosted each January by the Morgan Center to start or refresh your PDP in community with colleagues. Periodic writing retreats throughout the year can also be used well for this type of reflective writing.

### A.2.2 Making Use of WPI's NCFDD Membership

It's common for Associate Professors to create a PDP they're excited about but then face challenges implementing it. The National Center for Faculty Development and Diversity (NCFDD) has a "core curriculum" of monthly webinars focusing on key skills such as academic time management (e.g., semester strategic plans and weekly planning meetings), writing productivity, personal wellness, and the art of saying no. The NCFDD also forms online communities for writing accountability (e.g., 14-day writing challenges). These resources and benefits are available to all WPI faculty at no cost. To join, go to the [NCFDD home page](#), click "Become a member," and select WPI from the drop-down menu to register and login.

The [Faculty Success Program](#) is NOT free (close to \$4,000) but can be an excellent investment to achieve greater writing productivity and work-life balance. This 12-week "virtual bootcamp" provides small accountability groups and a productivity coach. It's generally offered three times per year. Details about program elements, expectations, outcomes data, and testimonials can be found at the FSP link, along with advice on "making the ask" for funds. Questions about the NCFDD programs can be directed to [morgan-center@wpi.edu](mailto:morgan-center@wpi.edu).

### A.2.3 Forming and Utilizing Your Mentoring Team

The transition from Assistant to Associate TRT Professor is an important time to assess and renew your professional network. In fact, thinking about mentors and advocates is integrated into the PDP process. Effective mentoring relationships are often peer-to-peer rather than hierarchical, and different mentors serve different purposes: intellectual community and readers, skills-building mentors, sponsors and advocates who promote your work and open up opportunities, accountability partners or groups, mentors for emotional support and problem solving, and mentors that guide career advancement. While all of these are important to consider, we'll focus here on mentors for career advancement at WPI, specifically at mid-career.

In 2017 the WPI faculty committed to Associate TRT Professor mentoring via the model of self-selected "mentoring teams." The role of the mentoring team is to foster continuing professional development and promotion in academic rank. It is self-selected so that you can identify people well-suited to your specific goals and directions. It's also fully focused on mentoring and professional development, without an evaluative role. Associate TRT Professor mentoring and mentoring teams are described in Part 2, Section 1E, p. 2-14 of the Faculty Handbook. While there are no strict requirements, the Handbook suggests that mentoring teams should consist of three senior colleagues. Following are some answers to FAQs:

**When should I form a mentoring team?** Many faculty feel like they need a break from career planning after promotion to Associate TRT professor, and that's perfectly understandable. We recommend that you form your team within 1-2 years after promotion to the Associate TRT rank, when you're creating

your mid-career PDP. You are responsible for recruiting your mentoring team. If this feels awkward to you, use the email templates in the ADVANCE resource collection on Canvas. Associate TRT Professors are asked to “register” their team by notifying the Morgan Center ([morgan-center@wpi.edu](mailto:morgan-center@wpi.edu)) to make sure you have access to resources and events.

**Who should I select?** All should be people that you’re reasonably comfortable with, who are well-connected on campus (and ideally externally as well), will advocate for you, are interested in your work, and will give you some time. (It won’t be burdensome!) Three people are suggested:

- 1. Your department head or program director, assuming they’re an advocate.** This person already knows your work, it’s an important relationship to cultivate, and they are usually knowledgeable about expectations for promotion from recent service on Joint Promotion Committees. If the relationship with your Department Head is difficult, consider another department head, recent department head, recent COAP members, or other full professors (TRT or TTT).
- 2. A senior colleague in your field.** Someone who has experience with your type of teaching and/or scholarship, can give feedback on your professional goals.
- 3. A senior colleague NOT in your field but with some shared interests.** Since all of the COAP members who will eventually make the recommendation about your promotion case will not be in your department, it can be helpful to have this type of outsider’s perspective.

**Can I choose someone from outside WPI to be on my mentoring team?** Yes, perhaps especially as a strategic choice for #2 (above) if no one at WPI aligns with your area. In annual team meetings, they could help your department head and the other team member better understand your work, its quality, and leadership quality. On the other hand, they will not be experienced with WPI’s promotion system and expectations. And remember you can/should \*always\* have external people in your broader network of mentors.

**Does my mentoring team eventually become my Nominator and Advocate?** Especially if your mentoring team stays stable during your period as an Associate Professor, they will come to know your work well and may certainly be good choices. You could eventually ask two of the three to serve as the (non-voting) Nominator and Advocate for your promotion case, but you are not obligated to do so.

**How often should we meet?** The Faculty Handbooks states a minimum expectation of a “formal” meeting of the Associate TRT Professor and all mentoring team members every 1-2 years, combined with more frequent 1-on-1 meetings. We strongly encourage an annual meeting with the full team. There is no expectation of a formal “letter” to document the outcomes of these meetings. (Remember Associate Professor mentoring teams do NOT have an evaluative role.)

**What should we talk about?** The centerpiece of your conversations with your mentoring team can be your professional development plan (PDP): long-term vision and short-term goals (1 year), what’s on your plate and how you’re trying to prioritize, professional development needs, broader mentoring network, strategies for implementing your plan, and building external visibility.

#### A.2.4 Making Use of Annual Reviews/Profession Development Conversation

Annual reviews with department heads provide an invaluable yet often untapped opportunity to springboard and foster short-term and long-term professional development of Associate Professors. Both the Committee on Financial and Administrative Policy (FAP) and initiatives of WPI's ADVANCE Adaptation grant (2018-2021) have made progress in transforming these conversations from a purely evaluative to a professional development model that meshes well with key elements of WPI's template for professional development plans. If your department head is on your mentoring team, you can also think of this as one of your regular 1-on-1 meetings. The conversation model includes the following components:

**Reflecting** on points of pride in the last year's work. Why is this kind of work important to you, to the department, and/or to WPI?

**Looking forward** to one or two dream projects or goals to advance or set in motion for the next year. How would those projects advance the department, WPI, you, your field? What are key steps? Resources? How can the department head help catalyze that work?

**Prioritizing across opportunities**, by analyzing your full portfolio of work across teaching, scholarship, and service, surfacing elements of hidden work, discussing trade-offs, and then prioritizing across activities in the context of your goals. You are also encouraged to discuss what makes you feel valued and types of recognition that mean the most to you.

#### A.2.5 Maintaining your CV(s)

Imagine: It is now time to put your promotion packet. Have you updated your CV recently? Or is your most recent version the one you put together for promotion to Associate? It could take several weeks to find and record your many accomplishments over the years since you were last promoted, and it will still not be as good as a CV that has been maintained regularly. While it is a good idea to update your CV as things happen, e.g., reflection on your latest course revisions, not all of us are that organized. At minimum, you should update your CV every year. One good time to do that is as you do your annual report – first update the CV and then create your annual report. Another good time is in May after classes end. Updating your CV serves as a means for reflecting on the past year and your progress toward promotion. It also serves as a basis for planning your next year. As such, an annual meeting with your mentors might also be a good time for updating your CV.

You might keep your CV in COAP format, which avoids the need for conversion at promotion time and ensures you capture all the information COAP wants. On the other hand, you may want to keep it in some other format if you need to distribute it occasionally. If you do that, be sure to track things COAP wants, but are not typically in a professional CV, such as courses taught each term, class sizes, teaching ratings and associated university averages, grants not funded, teaching innovations, etc. All of these can take days to weeks to reconstruct if you do not regularly track them.

Detailed COAP CV guidelines/instructions as well as a template can be downloaded from the COAP website [<https://www.wpi.edu/offices/faculty-governance/coap>]. Example CVs can be found in the

collection of successful promotion dossiers on the ADVANCE Canvas site (<https://canvas.wpi.edu/courses/14049>).

### A.2.6 Building Your Teaching Portfolio

For Associate Teaching Professors, your mid-career PDP should include goals related to professional growth and leadership in teaching. The Committee on Appointments and Promotions (COAP) asks promotion candidates to submit a teaching portfolio to document high quality teaching. Needless to say, it's a real drag to throw one together in the months or weeks prior to the deadline for submitting your promotion dossier. Building the portfolio gradually over time, in a way that's aligned with your goals for teaching, will be much less stressful and more importantly, you'll reap the benefits of a more reflective teaching practice and likely greater satisfaction with teaching. Note that "teaching" includes course instruction in any modality, project advising, thesis advising, and academic advising or student mentoring.

Ultimately, teaching portfolios submitted for promotion should examine teaching from three lenses: self-assessment, perceptions of students, and peer review. It's worth thinking ahead about types of evidence you will present that go beyond student ratings: measures of learning through rubrics or inventories, use of research-based teaching practices, classroom observation protocols that align with your goals, and the like. Keep an eye out for resources and programs about teaching portfolios offered by the Morgan Center and aim to work on your portfolio at least once per year.

See the Appendices for a document that provides basic guidance on the contents of teaching portfolios and a holistic rubric that COAP uses to evaluate high quality teaching.

## B. Applying for Promotion

This section focuses on information that promotion candidates need to know and act on. Section C provides direct guidance for Nominators and Advocates. That said, we encourage everyone to read everything.

### B.1 Overview of Promotion Process and Key Stakeholders

#### Stakeholders List

- Associate Professors
- Associate Professor Mentoring Teams: In years after last promotion, advise on mid-career professional development and ultimately help assess readiness for promotion
  - Department Head (recommended but not required)
  - Faculty colleagues chosen by candidate
- Joint Promotion Committee: Reviews promotion case and makes recommendations to Provost
  - Six COAP members (voting), none of whom are in the same department as the candidate. (The COAP Chair assigns one of these members to be the **Tracker** for each case, responsible for monitoring the completion or receipt of required files.)
  - Promotion Nominator (non-voting) who is the Department Head or Program Director
  - Promotion Advocate (non-voting) chosen by candidate

- Faculty Governance Coordinator: Penny Rock (handles all logistics)
- Promotion Case Contributors
  - Professional Associates (internal and external)
  - External Reviewers (for Research Track candidates only)
  - Former students: via survey and course evaluations
  - Others unsolicited
  - Provost (also charged with consulting the appropriate Dean and the President)
  - Board of Trustees

## B.2 Promotion Timing: When Am I Ready?

The promotion policy states a 5-year guideline for minimum time at the Associate TRT rank. The purpose of this guideline is to make clear a candidate's considerable professional growth and new types of contributions and leadership are expected for promotion to the most senior rank of Full.

The desired pace and trajectory toward promotion will vary. What matters is meeting the criteria, not how long it takes to get there. Timing for promotion should be assessed in consultation with mentors. As described in Section A, all Associate Professors are encouraged to form a mentoring team within 1-2 years after their first promotion. The annual meeting of the mentoring team should assess short-term and long-term goals, professional development, progress toward promotion, and by year five, readiness for promotion. You are also encouraged to consult with others outside your mentoring team, particularly recent COAP members, department heads, Deans, and colleagues at other institutions (including those who might be asked to support your promotion case with a letter), to assess your readiness for promotion. You can also ask colleagues who have been promoted recently in your department to share their dossier, to see how your accomplishments compare. Also note that COAP maintains a collection of successful promotion dossiers available to all WPI faculty and linked at the end of this guide.

The policy does leave open the possibility of going up early for promotion to full (i.e., in less than 5 years) in "exceptional circumstances." Such circumstances would include unusually large professional growth in high quality teaching (or high quality scholarship for Research Track) and leadership in a short period of time. The nominator should address these exceptional circumstances in their nomination letter.

## B.3 Roles of the Nominator and Advocate

WPI's Associate-to-Full promotion system is unique in that there is no formal review or recommendation at the departmental level, and no voting members of the Joint Promotion Committee are from the candidate's department. This feature signals institutional values of "no silos" and cross-disciplinary collaboration and appreciation. It also makes it easier to keep expectations and standards more uniform across the university. The purpose of having a Nominator and Advocate is to provide that essential link to the candidate's specific context.

The Nominator is the candidate's Department Head or Program Director. The Advocate is chosen by the candidate to complement the knowledge and expertise of the Nominator regarding the candidate's

case. Both become non-voting members of the Joint Promotion Committee. They have access to all material submitted during a promotion review, and they attend all meetings of the joint committee. The main roles of the Nominator and Advocate are to assist other committee members in understanding the candidate's case.

The Nominator has some specific responsibilities:

- Submitting the formal notification of nomination to the Faculty Governance Office by the announced deadline toward the end of the spring semester
- Contacting potential external reviewers to see if they are willing to write a letter of appraisal (for Research Track candidates only)
- Preparing a detailed letter of nomination by the end of the summer
- Summarizing the case to COAP

The Advocate has some specific responsibilities:

- Working with Nominator to contact potential external reviewers (for Research Track candidates only)
- May submit a letter of support by the end of the summer
- Providing additional information/context for the case to COAP
- Answering questions that may arise during COAP meetings

The Nominator and Advocate share the following responsibilities:

- Guiding the candidate in preparing a strong dossier
- Guiding the candidate in selecting Professional Associates
- Becoming well-acquainted with the candidate's record
- Summarizing the candidate's case to the Joint Promotion Committee (JPC), putting in context the quality and leadership of the candidate's contributions
- Following up on any "homework" after the first JPC meeting in the fall

#### B.4 Choosing Your Nominator and Advocate

Some department heads/program directors may reach out to Associate Professors with an offer to nominate them for promotion, but it's common for Associate Professors to initiate these discussions. Ideally, some discussion about promotion and progress toward promotion occurs regularly as part of the annual developmental discussion between an Associate Professor and their Department Head and/or Mentoring Team.

The Department Head or Program Director will need to agree to serve as Nominator. The candidate can choose their Advocate.

**It may be helpful to think of the Nominator and Advocate as a team,** with some additional responsibilities for the Nominator as described in the previous section. Consider whether your nominator has any gaps and recruit an Advocate with complementary expertise. Your Nominator can

help brainstorm and assess options. It need not be someone who is already a close colleague. With sufficient advance notice, you can reach out to a prospective Advocate, share your CV and other materials, and ask to meet to discuss whether they'd be willing to serve as the Advocate on your case. Again, the policy does not state any constraints in terms of rank or institution but do consider WPI full professors (TRT or TTT) first, in your department or other departments. If there are no good options, you can consider former department heads and/or WPI faculty at different ranks who have expertise in your area. People outside WPI can also serve as Advocates. An external person may be helpful if no one at WPI is well-versed in your field. In this case, it would be good ask that person to be on your mentoring team a few years in advance of the promotion review so that they become familiar with WPI's promotion system and help you assess your readiness. The most important aspects are that the Nominator and Advocate are familiar with the candidate's contributions and can effectively communicate the significance of these contributions in their professional and institutional contexts.

Following are FAQs about Nominators and Advocates.

**In what situations might you choose someone from outside WPI to serve as your Advocate?**

- If there is no one at WPI who is well-versed in your type of scholarship

**Does my mentoring team become my Nominator and Advocate?**

- No, at least not automatically. They are good people to consider, but the decisions are separate.

**When should I make the decision about my Advocate?**

- The period between November to February is a good time to finalize the decision about whether to go up for promotion in the upcoming cycle and make sure that your Department Head or Program Director will nominate you. The choice of Advocate can follow after the choice of your Nominator, and your Nominator may have good advice about that. The deadline for choosing your Advocate is May 1.

## **B.5 External Reviewers and Professional Associates: Roles & Selection**

Letters from internal and external peers are weighed heavily by the Joint Promotion Committee and the Provost. These letters are especially important since, by design, COAP members are *not* in the candidate's field. Thus, they rely on the letters, in addition to the Nominator and Advocate, to understand the candidate's field and contributions. Input is sought from internal and external *Professional Associates* who are selected by the candidate. For Research Track faculty, input is also sought from *External Reviewers* who remain unknown to the candidate.

The key distinction between external Professional Associates and External Reviewers is that External Reviewers must be "arms-length" to the candidate. This means they cannot be co-PIs, co-authors, former advisors, departmental advisory board members, or have similar interests in the case. It is especially important that External Reviewers be recognized as experts in the candidate's area of scholarship because as independent evaluators, their assessment is taken very seriously by COAP for Research Track faculty.



The purpose of Professional Associates is to provide expert context and details about your teaching, scholarship, and leadership/service contributions that reinforce and extend information you provide in your personal statement, CV, and other documentation. Candidates often select co-teachers (if applicable), people who have conducted a peer teaching review for the candidate, collaborators on joint research projects or joint professional service activities as Professional Associates so that they can describe your specific roles and contributions in collaborative work.

COAP requests six Professional Associates and generally recommends a mix of internal and external people (i.e., three of each). A mix is required for Research Track TRT promotions. However, external Professional Associates are not required for Teaching Track TRT promotions.

- Internal Professional Associates are important because WPI does not have a formal department review for promotion. COAP members want to see how you're integrated into the university and understand your key roles. Internal Professional Associates provide key appraisal of your contributions to the department, program, and institution. Examples include: teaching collaborators, internal research collaborators, people who can speak knowledgeably about your contributions to program development, your impact in a leadership role, or your contributions to a committee. All else equal, choose people who are full Professors.
- External Professional Associates are usually people you've collaborated with on teaching, scholarship, or leadership/service projects, or people that you know are supportive and positive about your work. Again, consider teaching collaborators, research collaborators, peers who have adopted your teaching materials, conference collaborators or others who are knowledgeable about external service to your profession, including your role as a mentor and supporter of junior faculty.

Candidates should consult with their Nominator and Advocate about their planned list of Professional Associates. For Research Track faculty, the Nominator and Advocate might also discuss with the candidate the nature of their subfield(s), typical types of contributions in that subfield, leaders in the subfield, and those to avoid in the subfield so that they can make good choices for external reviewers. The Nominator and the Advocate, in consultation with COAP members, are ultimately responsible for selecting and recruiting External Reviewers for Research Track faculty, and the identity of those who agree should remain unknown to the candidate.

For both internal and external Professional Associates, *ask* if they will be able to provide a letter. This is usually done in an email message. Professional Associates from WPI might be better at addressing your contributions to teaching, project advising, collaborations, etc. at WPI. Professional Associates outside of WPI might be better to provide information on your contributions to your specific field of teaching, scholarship, impact of your work (especially outside of WPI), contributions on a specific piece of curriculum design, scholarship, etc. When asking if they would be willing to write a letter to support your promotion, identify specific areas you hope they could address in their letter. Following are some examples:

- Professional Associate from within WPI: ... *Would you be able to provide a letter? ... If you could specifically comment on our work advising projects in X term of YEAR, I think that would be very helpful to COAP.*
- Professional Associate outside of WPI: ...*Would you be able to provide a letter? If you could specifically comment on our collaboration in our recent publication in the Journal of Impressive Work, I think it would be very helpful to the promotion committee. The committee would be interested in seeing how my contributions helped the development of this paper. In addition, the committee would be interested in how this work has contributed to our field and submission of our recent grant proposal.*

## B.6 Preparing Your Promotion Dossier

Putting together a promotion dossier can be a highly satisfying process as you reflect on your accomplishments and communicate your identity as a teacher-scholar. It can also be time-consuming and stressful if left until the last minute. We recommend that you begin outlining your package at least 3 months ahead of the deadline.

Candidates often wonder how much of their career should be addressed in their promotion dossier. While the CV should cover your whole academic career, the personal statement, teaching portfolio, and scholarly artifacts should focus primarily on growth and contributions since your last promotion at WPI.

Prior to submitting your promotion dossier, in addition to reading this portion of the guide it may be helpful to browse through the collection of sample promotion dossiers curated by COAP (currently on the ADVANCE Canvas site). What you'll find is that there's quite a bit of variation, which signals that materials can and should be tailored to your own professional identity and types of work.

The following sections describe the purpose of each component of the dossier and suggestions for content and organization.

### B.6.1 COAP-Format Curriculum Vita (CV)

Maintaining this CV was previously discussed in section A.2.7. The purpose of the CV is to show COAP members and other reviewers the entirety of your activities in teaching, scholarship, and various types of leadership and service. It should span your entire academic career, post-graduate school, so it will be a lengthy document. Our main advice is to follow the COAP format, include all requested information, and make it easy to read and navigate through use of formatting. Instructions and a template for the CV can be downloaded from the COAP website [<https://www.wpi.edu/offices/faculty-governance/coap>].

If you feel there is a type of professional activity that does not fit into the COAP format CV, discuss it with your Nominator and Advocate, and if you don't arrive at a solution, reach out to the COAP Chair for guidance.

### B.6.2 Personal Statement

The purpose of the personal statement is to provide a compelling professional self-portrait about your contributions to WPI, your field, and the wider world and to provide clear evidence that you've met the criteria for promotion:

For Teaching Professors: high quality teaching, considerable professional growth, and leadership in some aspect of teaching that is recognized at WPI and ideally externally as well.

For Research Professors: high quality scholarship, considerable professional growth, and leadership in scholarship/creativity that is recognized at WPI and beyond WPI.

The statement should also frame your future plans. **The statement can be up to 10 pages maximum, double spaced.** Remember that other components of the dossier— teaching portfolio (if submitting), sample scholarly artifacts (if submitting), will add detail. Therefore, the personal statement can be fairly high level. You'll want to think through how all the documents work together and try to avoid overlap between them.

The personal statement should be organized with section headings. Usually, it begins with an **introductory portion** that briefly summarizes your early career and then turns to telling the story of your career since your last promotion. Try to weave this story in response to big questions: Who am I as a teacher-scholar? What purpose or problems have motivated my teaching and other work? How has my work made a difference to internal and external communities? If your contributions are highly integrative (e.g., teaching and scholarship, service/leadership and scholarship), you can set that up in the introduction and explain how the rest of the statement will be organized.

The heart of the personal statement is **separate sections on teaching, scholarship, and service**, aligned with the promotion criteria. However, depending on your role, you may not need all sections, or it is important to emphasize some sections over others.

For Teaching Track faculty, the section on teaching is most important. It is important to clearly articulate your professional growth and your leadership development, especially in teaching, as these are key components to promotion from Associate to Full for the Teaching Track. There is no requirement to have a scholarship section if this is not in your portfolio, but if it is in your portfolio, then please include it.

For Research Track faculty, the section on scholarship is most important. It is important to clearly articulate your professional growth and leadership development, especially in scholarship, as these are key components to promotion from Associate to Full for the Research Track. There is no requirement to have a teaching section if this is not in your portfolio, but if it is in your portfolio, then please include it.

If you wish, some service activities can be reframed as leadership. Some candidates with significant administrative roles have presented separate sections on leadership and service.

In all these sections, your goal should be to *summarize evidence of quality and leadership in your most important contributions*. The leadership needs to be recognized within WPI, but if you also have external recognition of the quality and leadership that is important to note. (Details will be evident in the teaching portfolio, scholarship artifacts and impact indicators, if provided.) You can and should assume that people have read your CV, which mostly characterized *quantity* of work, so you don't need to re-list

your activities. However, you'll probably want to briefly synthesize and call attention to some key data in your CV that have been central to your contributions or are particularly noteworthy: e.g., advised XX MQPs, YY IQPs, key teaching innovations, more than XX conference presentations, YY peer-reviewed publications, \$Z in external funding.

In order to provide evidence of high-quality teaching and scholarship, it may be helpful to consult the rubric that COAP uses to evaluate high quality teaching, and its matrix for multiple forms of scholarship. Both documents can be found in Appendices of this guide. Both of those tools are informed by six standards which have been identified to evaluate quality across diverse areas of faculty work: clear goals, adequate preparation, appropriate methods, significant results, effective presentation, and reflective critique.

If a lot of your work has been done collaboratively with others, it's important to explain your role and contributions in the personal statement. (And line up Professional Associates who will be able to reinforce the impact of your individual contributions.)

The personal statement should conclude with a brief section on **future plans**, again in the areas of teaching, scholarship, and leadership or service, as appropriate for your position. Typically, this might be a few paragraphs or half a page. No one is going to hold you to these future plans, but reviewers do want to see that you have ambitions for the next phase of your career—how you want to make a difference-- and plans for continued professional growth and leadership.

It's worth noting that the personal statement is NOT a place to be modest or humble. If writing that way is difficult for you, try putting yourself in a zone of pride in your accomplishments while providing factual evidence for your statements.

Example personal statements from successful promotion candidates can be found in the collection of dossiers archived on the ADVANCE Canvas site.

### B.6.3 Teaching Portfolio

The teaching portfolio expands on the teaching section of your personal statement and is the primary source of evidence for high quality teaching. In addition, it's the place to show your professional growth in teaching—how have your teaching practices and student outcomes changed since your first promotion, what innovations have you made? As you develop or polish your portfolio for promotion, we recommend that you review the rubric on high quality teaching in the Appendix of this Guide. It suggests what high quality teaching “looks like” in broad terms that can be interpreted in all disciplines and types of teaching.

Your teaching portfolio should *not* be just a collection of syllabi and other artifacts without explanation. It should begin with a reflective statement about your approach to teaching and learning and a presentation of multiple measures of teaching effectiveness. **This narrative should be 4-6 pages double spaced maximum.** Throughout this narrative portion you can introduce or reference teaching artifacts or materials attached to the portfolio. These might include course syllabi, key assignments or assessments, project advising materials, examples of student work, and peer review outcomes. The

narrative portion of the portfolio typically concludes with a brief statement of teaching goals for the future. The appendices include a listing of possible contents of the teaching portfolio for more ideas on what you might include. Any attached artifacts should relate, highlight, and/or provide visual evidence for the elements presented in the narrative. In other words, the artifacts should not just be a collection of all teaching materials used. **In total, the teaching portfolio should not exceed 50 pages (including the 4-6 pages double spaced for the narrative).**

The teaching portfolio is an important opportunity to provide context and evidence of teaching effectiveness beyond student ratings and from three lenses: your own assessment and reflection, peer review, in addition to the student voice. Unlike the personal statement where you present evidence of key accomplishments and strengths, the teaching portfolio is a place for balanced, critical reflection on strengths, challenges, and future areas of growth for your teaching and advising. Presenting just a rosy view does not meet the expectation of reflective practice in a teaching portfolio.

You can and should go beyond course instruction to include project advising, academic advising and mentoring, or other teaching roles that have been central to your mid-career. You won't be able to present *all* your teaching, so select a combination of activities where you've shown the most professional growth.

#### B.6.4 Sample Scholarly Artifacts

COAP asks Research Track candidates to submit a maximum of three scholarly artifacts as a sample of your scholarly contributions. These artifacts are sent to External Reviewers and reviewed by COAP members. While it is not required for Teaching Track candidates, those Teaching Track candidates who conduct scholarship are also welcome to include scholarly artifacts if that is part of your portfolio. (Note: there are no External Reviewers for Teaching Track cases). The matrix on multiple forms of scholarship (see Appendix) shows types of artifacts that go beyond peer-reviewed journal articles and include non-academic audiences.

You'll want to select the key threads or streams in your scholarship since promotion to Associate, and those that have had the most external impact and significance in your field or scholarly community. (Remember that these three artifacts will also be sent to your external reviewers!) They should illustrate the scholarly identity and high quality that you established in the personal statement.

To help you select which scholarly artifacts to include in your packet, we recommend that you talk with other people to help you assess your options together. You could talk with your Nominator and Advocate, other senior mentors in your field, or anyone else you think can help you assess which artifacts to include. For example, you might want to discuss with someone the tradeoffs between the caliber of the publication venue and measures of impact. General advice is to present your highest quality scholarly contributions, since external impact of all your work will be evident in the external impact report.

Most candidates include a **short introduction (no more than one page, double spaced total)** to the sample scholarly artifacts that provides a bit of context for each. The most common things to present are **authorship** explanations—what were your individual contributions—and some information about the **publication venue**—what is its position in your field, acceptance rate if available.

### B.6.5 Citation Index or Broader External Impact Report

For Research Track candidates, external impact essentially refers to dissemination and, especially, *use of your work beyond the WPI community*. Your CV already lists all your publications, presentations, and creative works. This part of your package goes beyond that. To what extent has your work been noticed, utilized, or adapted in your field, your scholarly community, or in the public sphere? Those who focus on discovery scholarship, and many other types, usually submit a citation index and h-index, which quantifies the citations of their publications, presentations, or other scholarly contributions. Your report may include other indicators of external impact such as reviews of your work, press and media coverage, downloads of scholarly materials or datasets, awards and recognition, or any other indicators that the candidate's scholarly contributions have had an impact beyond WPI, including social media impact or altmetrics. You may also present data that you have tracked yourself, such as number of institutions or individuals attending your workshops and using your materials. (This is why planning ahead to collect impact data appropriate to your work is so important – see section A.2.)

There is not one correct way to present a citation index or external impact report; it really depends on norms in your field, type of scholarship, and the communities and constituencies with whom you interact. Consult the following for a range of ideas and examples:

- [Impact report examples and templates](#): Libguide section from Gordon Library
- [Assessing research impact](#): full Libguide including discussion of altmetrics
- Multiple forms of scholarship matrix (see Appendix)
- Collection of successful promotion dossiers (ADVANCE Canvas site)

### B.7 Updating the Dossier

Promotion dossiers are due in early July (see calendar for specific date). Promotion candidates are encouraged to update their dossier with new accomplishments, any time before COAP makes its decision, sometime in the Fall. Therefore, consider sending updates right before the start of A-term and start of B-term. Updates are most often in the form of a memo, an updated CV (with new entries highlighted), and/or an updated external impact report/citation index.

### B.8 Notification of the Decision

Promotion awards are officially approved by the Board of Trustees at their winter meeting, which typically occurs in late February. (Section C.4 describes how the recommendation from COAP is passed along to the Provost, who then makes the final decision that is approved by the Trustees.) The Provost typically calls each promotion nominee the day after the Board meeting to notify them about the decision. A public announcement of promotion awards usually follows within a week. New titles and salary bumps become official on July 1.

## B.9 The Aftermath: What if you get turned down?

Getting turned down can seem devastating for some people. If you are not awarded promotion, this does not mean you will never get promoted to Professor or that your work is not valued. Rather, the Provost does not believe there is enough evidence in your promotion package at this point in time to recommend promotion. However, this is only a temporary setback. Take the opportunity to gather feedback:

- As specified in the Faculty Handbook, if you are not awarded promotion, the Provost will write you a letter that outlines the strengths and weaknesses of your case and provides constructive advice for addressing weaknesses and resubmitting in the future.
- Meet with your Nominator and Advocate. Discuss the Provost's letter with them and your mentoring team and consider advice that they provide. After these meetings you can decide whether you want to reach out to the Provost for more information. When you feel ready, start mapping out a plan for addressing perceived weaknesses in the case.

Overall, don't lose hope! Many applicants get promoted on their second attempt.

If you believe that your negative promotion decision was affected by a violation of academic freedom, improper procedures, or discrimination, you may file a grievance with the Faculty Review Committee (FRC). The FRC has the power to review and require reconsideration of negative decisions based on any of those three grounds. More information can be found in Bylaw One, Section IX of the Faculty Handbook.

## C. Guidance for Nominators and Advocates

### C.1 Identifying and Soliciting External Reviewers (For Research Track Candidates)

Nominators, with input from Advocates, hold the primary responsibility for identifying and soliciting external reviewers for Research Track candidates. External Reviewers should be recognized as leaders in the candidate's field and type of scholarship. They also need to be an "arms-length" away from the candidate and should not have any other conflict of interest (e.g., Advisory Board Member, current Board of Trustees Member). If the Nominator and/or Advocate are in the same field as the candidate, generating names may be relatively easy. If the candidate is in a different field or pursues a different type of scholarship, identifying reviewers will take more effort. Following are common strategies:

- When discussing the choice of Professional Associates with the candidate, Nominators should get a better sense of the candidate's field, professional networks, and types of impact. If the candidate suggests some external Professional Associates who are really arms-length (e.g., someone who knows the candidate but has not collaborated), Nominators can suggest that some be pursued as External Reviewers instead. However, the candidate should not directly identify External Reviewers or be told their identity.
- Consider scholars who have cited the candidate's work, authors cited by the candidate, Fellows or other types of recognized leaders in the candidate's field, and officers in the candidate's professional association(s).

- For candidates whose scholarship involves engagement with external groups (e.g., giving workshops, doing work with industry or community groups), those clients are in a good position to report on the quality of the work and its significance and impact.
- Use a “snowball” approach: When speaking with or corresponding with potential external reviewers, ask if they have anyone else to recommend.

The official promotion policy in the Faculty Handbook states that the Nominator and Advocate identify potential external reviewers and that the Joint Committee then develops a priority list of reviewers. In practice, however, COAP recognizes that it is in the best interest of the candidate for the Nominator and Advocate to identify the most suitable external reviewers. Therefore, COAP typically delegates this responsibility to the Nominator and Advocate. Nonetheless, Nominators and Advocates should not hesitate to reach out to COAP members if they have questions about their list of potential reviewers.

COAP needs to have 5-6 letters from External Reviewers, so it’s best to recruit 6-7 in case someone does not come through or does not write a substantial evaluative letter. Nominators should email or call External Reviewers to ask their willingness to review the dossier and write a letter of appraisal. This process typically needs to start by May 1. Nominators must confirm willingness *before* providing names to the Faculty Governance Coordinator. Once the Nominator provide the names, the Faculty Governance Coordinator takes responsibility for sending the candidate’s dossier and complete instructions from COAP.

Following are additional best practices for Nominators with respect to External Reviewers:

- Some department heads begin soliciting External Reviewers with informal conversations at conferences several months or up to a year in advance of an anticipated promotion nomination. For those that give verbal agreement, the department head follows up with an email or phone communication when the nomination is going forward in May.
- Give directions to External Reviewers to lessen the time it takes for them to write an effective letter: *I’m asking you because you’re an expert on a, b, c. If you could focus on that, we’ll find others to comment on x, y, z.*
- Follow up with External Reviewers in late July to remind them about the letter. That way if their situation has changed, there is still time to recruit someone else. In addition, this check-in can be used to inquire if there are questions about WPI’s promotion criteria and standards and recognized forms of scholarship. This may be especially important for non-discovery forms of scholarship or if the reviewer is from a very different type of institution.
- Nominators should be prepared to discuss the qualifications of each external reviewer for meetings of the JPC in the fall.

**An example email message soliciting an external reviewer can be found in the Appendices.** In some cases, more letters from External Reviewers must be sought in the fall if members of the JPC feel there is insufficient information due to missing or cursory letters or if they believe the letter writers know the candidate too well. Nominators can lessen this possibility by using the best practices above.



## C.2 Writing the Nomination Letter

The contents of the nominator letter need not be long (usually ~1.5-2 pages) but should summarize the reason that they believe that the candidate deserves to be promoted. The letter is often organized according to the criteria for promotion:

- A description and analysis of the quality of the **nominee's teaching, if applicable for their portfolio**. The committee already has access to student ratings, alumni evaluations, and the teaching portfolio but welcomes any additional information on the candidate's teaching. This section is especially important for Teaching Track candidates as there should be evidence of high-quality teaching, professional growth and leadership in teaching to be promoted. There may not be much to say for Research Track candidates and that is okay.
- A description and analysis of the quality of the **nominee's scholarship or creative work, if applicable for their portfolio**. As you are considering the candidate's scholarship it is important to remember that scholarship exists along a continuum, and scholarly contributions may combine or cut across traditional categories of teaching, scholarship/creativity and service. This section is especially important for Research Track candidates as there should be evidence of high-quality scholarship, professional growth and leadership in scholarship to be promoted. There may not be much to say for Teaching Track candidates and that is okay.
- A description and analysis of the **nominee's service** to the department or programs, the university, the profession, or the community. The CV should list all activities; however, this does not always provide a complete picture of the nominee's contributions to WPI and beyond.
- A description and analysis of the considerable professional growth and recognized leadership in teaching or scholarship (depending on whether the candidate is Teaching or Research track) as these are key components to the promotion criteria.
- **Any additional information** that will be helpful to the Joint Committee in its deliberations.

Since COAP is made up of members from different disciplines, it is important to set the context of the candidate for COAP in all areas (teaching, scholarship, and service) based on the best lens the Nominator has (e.g., department head, collaborator, teaching, scholarship, service). This can be the context for the department, the field (or subfield), the interdisciplinary nature of the work, or whatever context the Nominator is best equipped to provide. For instance, the Nominator could provide information on how the candidate's teaching and teaching strategies relate to the department or field. The Nominator could provide information on types of scholarly artifacts that are important in a field (e.g., exhibits, peer reviewed publications, conference proceedings, etc.), and potentially how the candidate ranks with others in the field or other full professors in the department on the impact of these scholarly artifacts. The Nominator can also provide information about the engagement in service and contributions in service to the department, institution, and profession. It is also important for COAP to understand the nature of the accomplishments and how they vary according to norms that the Nominator can provide context to (e.g., teaching norms, departmental norms, field norms, types of scholarship, funding norms). A listing of the parameters that are significant in the field but might not be apparent to COAP, such as service on study sections or advisory committees, is very helpful.

### C.3 Writing the Advocate Letter

A letter by the Advocate is not required. However, a letter from the Advocate would serve to put their evaluation in the written record where the Dean and Provost may see it. Therefore, if an Advocate would like to provide a letter, COAP will happily receive and review it. The letter by the Advocate need not be long (usually ~1.5-2 pages) but should summarize the reason that they believe that the candidate deserves to be promoted in relation to the criteria. Since the Nominator will provide a complete overview of the case in their nomination letter, the Advocate may choose to do something similar or focus on the context in which they know the candidate best (e.g., teaching, scholarship, service). If the Advocate is more aware of certain aspects of the candidate's case than the nominator (e.g., teaching expertise/strategies, particular area of scholarship, etc.), this information will be particularly helpful. What will be most important is any additional information that the Advocate believes will be helpful to the Joint Committee in its deliberations as it is important for COAP to understand the nature of the accomplishments and how they vary according to departmental norms, field norms, and types of scholarship.

### C.4 Joint Promotion Committee Meeting 1

During the first meeting of the Joint Promotion Committee, the Chair will highlight the promotion criteria for the position in the Faculty Handbook, remind the JPC about the issues related to biases and welcome conversation on any perceived biases related to the case, and then invite the Nominator and then the Advocate to summarize briefly the case for promotion. The committee will have read the Nominator's and Advocate's (if provided) letters, so there is no need to read it to the committee. Rather, the invitation serves as an opportunity for the Nominator to highlight important aspects of the case and open the wider discussion of the case. The Advocate then can amplify what the Nominator highlighted and to add any additional information they believe is important to the case. Then the committee as a whole will discuss aspects of the case in light of the promotion criteria and ask questions they have about the case. A key goal of this meeting is for the Nominator and Advocate to "translate" the nature and norms of the candidate's discipline/sub-discipline for other members of the joint committee. Members of the committee may comment on strengths and weaknesses, ask questions, seek clarifications of missing or confusing material, or engage in conversation regarding any perceived biases related to the case. All members of the Joint Committee observe strict rules of confidentiality during all phases of the promotion review.

Following are typical issues that might arise at the first meeting and that Nominators and Advocates should be prepared to translate or explain: indicators of high quality teaching; the relative standing of journals in the field; disciplinary or departmental expectations about teaching, levels of funding or number of publications; whether conference and workshop papers are important in the field; the role of undergraduate projects or graduate theses in the department; conventions about the order of authors in a publication; typical citation counts; forms that scholarly artifacts may take besides peer reviewed articles; the role of community engagement; and the independence of external reviewers.

During this discussion, the joint committee examines the strengths and weaknesses highlighted by peer reviewers and identifies contextual factors and any missing or unclear information. Gathering relevant

information about contextual, missing or unclear items may reduce the potential for misinterpretation and limit the influence of implicit or explicit bias. One outcome of the first meeting may be a list of action items or “homework” for the Nominator, Advocate, or Candidate. Action items might include requests for additions or clarifications to the CV, updates on the status of teaching or scholarly artifacts under review, improved organization of material, or requests for additional letters of reference. Depending on the requests, the Nominator and Advocate can determine who is best equipped to handle it. For some requests, the Nominator will need to contact the candidate, and the candidate should provide whatever was requested to the Executive Assistant, Faculty Governance Office before the beginning of Term B. The exception is that requests for new external letters are handled independently of the candidate, who must not be informed of the name external reviewers or the content of any letters of appraisal.

### C.5 Joint Promotion Committee Meeting 2

If necessary, the joint committee meets again during Term B to make a recommendation on a nomination for promotion. The Nominator and Advocate should be prepared to report on any “homework” identified at the first meeting.

### C.6 Promotion Committee Vote and Afterwards

When all members of the Joint Promotion Committee agree that there has been sufficient discussion, a vote is taken by the six voting members of the Joint Committee for or against promotion by means of a secret ballot, with the majority ruling. **The Nominator and Advocate will know the recommendation of the Joint Committee but are not allowed to share this information with the candidate.**

By the end of Term B, the Joint Committee forwards to the Provost a letter conveying the result of its vote as a unitary recommendation for or against promotion and summarizing the salient reasons for its recommendation. The letter is drafted by the “Tracker,” a COAP member who is assigned for each case. The Provost may ask to meet with the Joint Committee to discuss any of its recommendations, and must meet with the Joint Committee, including the Nominator and Advocate, in the case of potential disagreement. If necessary, this meeting usually takes place in January.

**FAQ: Why does COAP provide a unitary recommendation to the Provost rather than reporting an actual vote tally?** This practice is shared for all tenure and promotion recommendations that emerge from WPI faculty governance committees. While the advantages and drawbacks are debatable, the main rationale is that there is value in avoiding a “class system” of promotion (i.e., unanimous votes vs. split votes).

### C.7 Checklist for Nominators and Advocates

These are the tasks that Nominators and Advocates will need to do:

- Notify Faculty Governance Office (Penny Rock) of the nomination by April 15th (Nominator)
- Provide guidance to candidate in selection of Professional Associates and preparation of dossier (Nominator & Advocate)

- Identify and Solicit 6-7 External Reviewers for Research Track Candidates by May 1 (Nominator & Advocate)
- Have External Reviewers provide qualifications in letter or be prepared to discuss qualifications at the first JPC Meeting in Term A for Research Track candidates. (Nominator & Advocate)
- Friendly reminder to External Reviewers in Mid-Late July that letters are due August 15 for Research Track candidates (Nominator & Advocate)
- Write Nomination Letter and submit to Penny Rock by August 15 (Nominator)
- Optional: Write Advocate Letter and submit to Penny Rock by August 15 (Advocate)
- Prepare to present the case to COAP at the first JPC meeting (Nominator & Advocate)
- Complete homework, if requested, between two JPC meetings

## D. Efforts to Value Diversity and Mitigate Bias in Faculty Evaluation

WPI is committed to fair and equitable review of promotion cases. To enact this commitment, promotion decision makers at WPI participate in regular training about the ways in which biases and stereotypes influence information in promotion dossiers and evaluations of that information. The training also includes practice applying multiple strategies to mitigate bias. In addition, at the start of each promotion case, the chair of the Joint Promotion Committee articulates the goal to openly discuss ways in which biases might affect that case.

In an attempt to limit biases among external reviewers (for Research Track candidates), the letter they receive from COAP explains WPI's broad definition of scholarship and asks them to apply WPI's criteria rather than their own. The letter also asks them to guard against biases that might influence their evaluation.

## E. Appendices

### E.1 Multiple Forms of Scholarship Matrix

As stated in the Promotion Criteria: “Candidates for promotion may make contributions to the scholarship of discovery, the scholarship of integration, the scholarship of application and practice, the scholarship of teaching and learning, or the scholarship of engagement. Contributions may be in one area or across multiple areas of the continuum of scholarship. Scholarly contributions to any area or areas are valued equally by WPI.”

The following descriptions and examples are not intended to be exclusive or exhaustive. Things will vary by discipline, department, or academic division. Therefore, this matrix is meant to be a guide and to help people think more about each area of scholarship, rather than be a checklist.

Scholarship Area	Brief Description	Products/Artifacts (work created by the candidate)	Evidence of Quality (evaluation of work created by the candidate)	Impact & Leadership (influence of work on others or the field)
<b>Discovery</b>	<p>Creation of new disciplinary (or interdisciplinary) knowledge through creative/critical thought, research, and testing that is shared with others</p> <p>Example: empirical research</p>	<ul style="list-style-type: none"> <li>• Publications (articles, books, policy papers, etc; may be based on theses, MQPs, IQPs)</li> <li>• Presentations (conferences, round tables, webinars/virtual)</li> <li>• Inventions and patents</li> <li>• Grant proposals</li> <li>• Creative products (e.g., exhibits and performances)</li> <li>• Original creations in writing or multimedia, artistic works, or new technologies</li> <li>• Publicly available electronic resources (e.g., software, websites, databases, etc.).</li> </ul>	<ul style="list-style-type: none"> <li>• Peer-review and acceptance of artifacts</li> <li>• Journal impact factors (if appropriate)</li> <li>• Citation index (if appropriate)</li> <li>• Research productivity indices</li> <li>• Successfully funded competitive grants</li> <li>• Reviews of published work (e.g., books)</li> <li>• Awards and honors</li> </ul>	<ul style="list-style-type: none"> <li>• Citations of work by others</li> <li>• Designation as an expert: guest lecturer, invited speaker, keynote address, scholarship reviewer (grants, papers, books, conferences), tenure/promotion external reviewer, expert witness</li> <li>• Featured performances at international, national, or regional venues</li> <li>• Number of views, shares, likes for online dissemination of scholarship (e.g., podcasts, videos)</li> <li>• Editorship of high-quality disciplinary and interdisciplinary journals</li> <li>• Leadership in professional organizations and duration of such leadership</li> </ul>

Scholarship Area	Brief Description	Products/Artifacts (work created by the candidate)	Evidence of Quality (evaluation of work created by the candidate)	Impact & Leadership (influence of work on others or the field)
<b>Integration</b>	<p>Critical evaluation, synthesis, analysis, integration, or interpretation of disciplinary (or interdisciplinary) research or creative work produced by others</p> <p>Example: literature review, meta-analysis</p>	<ul style="list-style-type: none"> <li>• Reflective essays and reviews</li> <li>• Translations</li> <li>• Popular publications</li> <li>• Syntheses of the literature (e.g., literature reviews, meta-analyses, theory building papers)</li> <li>• Products/artifacts typical of discovery and application and practice</li> </ul>	<ul style="list-style-type: none"> <li>• Reviews in newspapers for a creative work</li> <li>• Book talks at universities and to public audiences</li> <li>• Examples where colleagues from inside or outside WPI have used the scholarship</li> <li>• Evidence typical of discovery, application and practice, teaching and learning, and engagement.</li> </ul>	<ul style="list-style-type: none"> <li>• Evidence that others or the field have been influenced by the outcome (e.g., adoption, changes in perspectives in field; sharing materials)</li> <li>• Public venues to share scholarship with non-specialist/non-academic audiences</li> <li>• Impact/Leadership typical of discovery, application and practice, teaching and learning, and engagement</li> </ul>
<b>Application and Practice</b>	<p>Use of a scholar's disciplinary or interdisciplinary knowledge to address important individual, institutional, and societal problems</p> <p>Example: development of a technology</p>	<ul style="list-style-type: none"> <li>• Translational research</li> <li>• Commercialization</li> <li>• Start-ups</li> <li>• Technology transfer</li> <li>• Technology development (e.g., assistive, learning)</li> <li>• Applied research supported by industry or government (e.g., policy adaptations, program recommendations, industry/government funding)</li> <li>• Products/artifacts typical of discovery and engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Products shared with stakeholders and open to review and critique by stakeholders and by peers</li> <li>• Evidence typical of discovery, integration, teaching and learning, and engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Consulting related to work</li> <li>• Approaches, methods, and tools, adopted and assessed by an end user(s) with positive results</li> <li>• Impact/Leadership typical of discovery, integration, teaching and learning, and engagement</li> </ul>

Scholarship Area	Brief Description	Products/Artifacts (work created by the candidate)	Evidence of Quality (evaluation of work created by the candidate)	Impact & Leadership (influence of work on others or the field)
<b>Teaching and Learning</b>	<p>Development and improvement of pedagogical practices that are shared with others</p> <p>Example: development and assessment of teaching/learning practices</p>	<ul style="list-style-type: none"> <li>• Assessment and evaluation of teaching and student learning (e.g., teaching portfolio, professional development of other teachers)</li> <li>• Development and dissemination of instructional materials used by others to improve pedagogy and learning (e.g., syllabi, notes, manuals, books etc.)</li> <li>• Products/artifacts typical of discovery, integration, application and practice (e.g., learning technologies)</li> </ul>	<ul style="list-style-type: none"> <li>• Products shared with other teachers at other universities or educational institutions</li> <li>• External reviews of pedagogical practices</li> <li>• Public dissemination (e.g., podcast, summative blogpost, public science communication campaign, etc.)</li> <li>• Evidence typical of discovery, application and practice, and engagement</li> </ul>	<ul style="list-style-type: none"> <li>• Wide Adoption of materials and methods by others (e.g., downloads, likes, shares)</li> <li>• Popular (3rd party) articles</li> <li>• Social media hits and followers</li> <li>• Impact/Leadership typical of discovery, application and practice, and engagement</li> </ul>
<b>Engagement</b>	<p>Collaborative partnerships with communities for the mutually beneficial exchange of knowledge and resources and/or transformation of communities through shared projects and research</p> <p>Example: Community-based programming (e.g., health assessments)</p>	<ul style="list-style-type: none"> <li>• Community-based programs that enhance curriculum, teaching and learning</li> <li>• Educational or public outreach programs</li> <li>• Partnerships with communities beyond campus to address critical societal issues, prepare educated citizens, or contribute to the public good</li> <li>• Publication in public scholarship venues (e.g. videos, blogs,</li> </ul>	<ul style="list-style-type: none"> <li>• Works that benefit the external community, are visible and shared with stakeholders, and are open to review and critique by community stakeholders and by peers</li> <li>• Sustained, mutually beneficial relationships with communities and organizations.</li> </ul>	<ul style="list-style-type: none"> <li>• Bringing to light and/or improving economic, social or environmental conditions of a community, region, agency, industry, or other sector</li> <li>• Generation of major gifts to endow a program</li> <li>• Citations or adoption of work by communities</li> <li>• Impact/Leadership typical of discovery, integration, application and practice, and teaching and learning.</li> </ul>

		<p>open access journals, digital humanities products, etc.)</p> <ul style="list-style-type: none"> <li>• Products/artifacts typical of discovery, integration, application and practice, teaching and learning</li> </ul>	<ul style="list-style-type: none"> <li>• Evidence typical of discovery, integration, application and practice, and teaching and learning.</li> </ul>	
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*Note: Prepared by WPI NSF ADVANCE Adaptation Working Summer 2020 and 2019 Groups and other faculty volunteer reviewers.*



## E.2 Teaching Portfolio Guidelines and Rubric for Evaluating High Quality Teaching

### A Rubric for Evaluating Teaching in Promotion Cases

ADVANCE Working Group 3 – Summer 2020

**Statement of need:** The promotion policy directs candidates to document high quality teaching by submitting a teaching portfolio. The policy suggests general elements of the portfolio, and more detailed guidance about portfolio contents is being prepared. However, the policy does not directly communicate metrics or indicators by which portfolios would demonstrate high quality teaching. The purpose of this proposed rubric is two-fold: 1) to help candidates show evidence of high quality teaching; and 2) to guide COAP members and the Provost to apply consistent and appropriately high standards for evaluation of teaching.

**Rationale and use of rubric:** The promotion policy for tenured faculty identifies six standards to evaluate quality across teaching, scholarship, and service: clear goals, adequate preparation, appropriate methods, significant results, effective presentation, and reflective critique (Glassick, Huber, and Maeroff, *Scholarship Assessed*, 1997). These standards are integrated in the holistic rubric below, which is adapted from an NSF-sponsored project at the University of Kansas.

The rubric describes indicators of highest quality in each of eight dimensions of teaching. *It is not expected that a successful candidate will achieve this high standard in all dimensions or that all of the examples of strong evidence will be met. Moreover, it must be understood that some faculty members, because of their particular teaching assignments, do not have the opportunity to contribute in some areas such as project-based learning and mentoring and advising.*

The indicators should be evident from multiple sources of information:



Category or Dimension	Strong Evidence or Indicators of High Quality
<p><b>Course goals and content</b> <i>What are students expected to learn? Is content aligned with the curriculum?</i></p>	<ul style="list-style-type: none"> <li>• Course goals or learning outcomes are well-articulated, appropriately challenging, and clearly connected to program or curricular goals</li> <li>• Content is appropriate in range and depth, related to current issues and developments in field</li> <li>• High quality materials, well aligned with course goals</li> </ul>
<p><b>Teaching methods and practices</b> <i>How is in-class and out-of-class time used? What assessments and learning activities are used to help students learn?</i></p>	<ul style="list-style-type: none"> <li>• Activities are well-planned, integrated, reflect commitment to provide meaningful assignments and assessments</li> <li>• Instructor uses effective, high impact, or innovative methods to foster student learning</li> <li>• In- and out-of-class activities provide opportunities for practice and feedback on important skills and concepts</li> <li>• Students show high levels of engagement</li> </ul>

<p><b>Achievement of learning outcomes</b>  <i>What impact do courses have on learners? What evidence shows level of achievement?</i></p>	<ul style="list-style-type: none"> <li>• Assessments and standards to evaluate student work are authentic, clear, and connected to program or curriculum expectations</li> <li>• Instructor supports learning and success for all students</li> <li>• Quality of learning fosters success in other contexts (e.g., subsequent courses or projects)</li> </ul>
<p><b>Classroom climate and student perceptions</b>  <i>What are students' views of their learning experience? How has student feedback influenced instruction?</i></p>	<ul style="list-style-type: none"> <li>• Evidence that class climate is respectful, motivating, engaging</li> <li>• Student feedback on instructor accessibility and interaction skills is generally positive</li> <li>• Students perceive they are learning important knowledge or skills</li> <li>• Instructor is responsive to student feedback in short-term and long-term</li> </ul>
<p><b>Reflection and commitment to professional growth in teaching</b>  <i>How has the instructor's teaching changed over time? What resources are used to support teaching development?</i></p>	<ul style="list-style-type: none"> <li>• Regularly adjusts teaching based on reflections on student learning</li> <li>• Seeks and makes use of peer review of teaching</li> <li>• Uses pedagogical resources to support teaching development (e.g., evidence-based teaching practices, high impact practices, professional development workshops)</li> </ul>
<p><b>Project-based learning</b>  <i>To what extent has the instructor utilized WPI's signature pedagogy and improved in project advising?</i></p>	<ul style="list-style-type: none"> <li>• Engages in IQP and/or MQP advising, advising of projects in the humanities and arts, or projects embedded in undergraduate or graduate courses and programs (department-dependent)</li> <li>• Makes effort to utilize institutional knowledge and practices that support effective project-based learning</li> <li>• Makes use of student feedback about project advising</li> <li>• Shows development and improvement as a project advisor over time</li> </ul>
<p><b>Mentoring and advising</b>  <i>How effectively has the faculty member worked individually with undergraduate or graduate students?</i></p>	<p>(as appropriate to department and discipline)</p> <ul style="list-style-type: none"> <li>• Shows strong commitment to success, wellness, and personal/professional development of undergraduate academic advisees (e.g., number of advisees, advising/mentoring methods, student testimonials)</li> <li>• Shows strong commitment to success, wellness, and personal/professional development of graduate students and research trainees (e.g., rates/time to degree completion, advising/mentoring methods, student testimonials)</li> </ul>
<p><b>Commitment to diversity and inclusion</b>  <i>How has the candidate made efforts to support the success and inclusion of diverse students (e.g., across race, ethnicity, gender, class, ability)</i></p>	<ul style="list-style-type: none"> <li>• Development of curricula and teaching/mentoring strategies are intentionally designed to enhance diversity and inclusion</li> <li>• Advises disproportionately high number of under-represented students</li> <li>• Engages in training/professional development to enhance intercultural competencies and skills and understanding of structural inequities for historically under-represented and marginalized groups</li> </ul>

\*This rubric has been reused and adapted under Creative Commons Attribution-Non-commercial 4.0 International License from Follmer Greenhoot, A., Ward, D., & Bernstein, D. (2017). *Benchmarks for Teaching Effectiveness*. University of Kansas.

### E.3 COAP-format CV Instructions and Template

COAP recognizes that there are disciplinary differences in CV formatting recommendations. However, **to facilitate the review process for COAP, the Deans, and the Provost, COAP requests that promotion candidates use the following guidelines when putting their CV together for promotion review.** Some of the guidelines are required and others are recommendations that you can choose to follow or not, as indicated below. Additional categories may be added to the CV if those categories are appropriate to the form and impact of the candidate's teaching, scholarly, or service contributions. Please note that the CV is the place where candidates provide detailed information about accomplishments in teaching, scholarship, and service. Candidates are invited and encouraged to use other areas of their promotion dossier to make arguments for the quality and impact of their work.

#### General Formatting Guidelines

- 1) Please use single space rather than 1.5 or Double Spacing throughout. (Required)
- 2) Please list all contributions in Reverse Chronological Order (most recent to furthest in the past). (Required)
  - a. This helps those reviewing the CV see the most relevant information for the current promotion first.
- 3) Please number contributions that come under a heading (e.g., Publications, Presentations, etc.). (Required)
- 4) Bolding your name (especially in the scholarship subsection) can be helpful to reviewers (Recommended, not required)
- 5) Please indicate if any co-authors/contributors/presenters are graduate students or undergraduate students using some notation with indication of what your notations mean (e.g., denotes Graduate Student co-author; denotes Undergraduate co-author)
  - a. COAP Recommends:
    - i. double underline= Graduate Student
    - ii. single underline = Undergraduate Student
- 6) You are welcome to include information on your CV that will help individuals not in your field understand your contributions (e.g., journal impact factor, journal ranking, conference acceptance rates, course evaluation numbers). You may also provide some of this information in a separate document (e.g., Citation Index, Teaching Evaluation Summary). (Recommended, but not required)
- 7) If an area of the required formatting is not applicable to you/your discipline, you can indicate that by putting "N/A" under that section. COAP recognizes that not every area listed will be applicable to every candidate (e.g., HUA Sufficiency's, Patents, Theses, etc.).

#### CV Order (Required)

#### Professional Experience

1. Education (in reverse chronological order)
2. Teaching experience at WPI or other universities (in reverse chronological order)
  - o Please make sure it is clear when the last promotion occurred (if applicable)

### 3. Work experience other than teaching (in reverse chronological order)

## Teaching

#### 4. Teaching innovations at WPI

- You are welcome to include a short paragraph addressing teaching innovations (Recommended, but not required)

#### 5. Courses taught at WPI (organized in a table)

- Please organize by course, listing the terms or semesters in which each course was offered.
- Please provide: Title of the Course, Term Taught, Enrollment, and summary evaluations for Q1 and Q2 on the WPI course report. (Required)

#### 6. Projects, Theses and Dissertations

- Please list and number each Humanities Project/Sufficiency, IQP, MQP, Thesis, and/or Dissertation (Required)
- Please organize this section based on the type of project (Required)
  - e.g., Use a subheading called “Major Qualifying Project (MQP)” and list all the MQPs under this subheading).
- Please indicate if you advised, co-advised, or consulted each project listed (Required)
  - You could also organize by the role played
    - e.g., using subheaders: MQPs Advised; MQPs Co-Advised; MQPs Consulted).
- Please list all student names, co-advisor names, and sponsor (if applicable) for each project (Required)
  - For example: Student, A., Student, B., & Student C. (Academic Year of Project). *Title of Project*. Co-Advisors: Faculty A. Sponsor: X.
- Since your CV will go out to outside of WPI, you may wish to define IQP and MQP on your CV. Here are a few examples of how you could explain these projects on your CV:
  - MQPs: These projects are required of all graduating undergraduates and are equivalent to a senior honors thesis at other institutions. The projects take two-thirds to the entire school year to complete and are equivalent to three or four courses (credit wise).
  - IQPs: This society-oriented project is a degree requirement for undergraduates and typically completed in the junior year. It can be completed off-campus or on-campus. It is equivalent to three or four courses (credit-wise).

#### 7. Independent studies conducted at WPI

- Please provide: Term ISP was conducted, Title of ISP, Names of Students Involved.
- Please indicate if the ISP served as a Minor Capstone (if applicable)
- Please organize in a meaningful way (e.g., Academic Year, Title of ISP, Minor Capstones, etc.).

## 8. Academic advising at WPI

- Please list the number of academic advisees each year at WPI.
- You do **not** need to list the names of each advisee.

## 9. Honors, awards and recognition related to teaching

- Please list any honors, awards, or recognitions you have received related to teaching.

## Scholarship/Currency

*\*Please note: COAP recognizes multiple forms of scholarship. COAP also recognizes that some areas listed under scholarship may be more or less applicable to different fields and types of scholarship. COAP has tried to be as inclusive as possible. If some area does not apply to you, please indicate that with an "N/A". If something important is missing, please add that category and feel free to reach out to a member of COAP for clarification.*

## 10. List of publications or scholarly contributions (includes exhibits, performances)

- You may divide the list into appropriate groups, such as: Books, Book Chapters, Journal Articles, Conference Proceedings, Reviews, Translations, Other Publications, etc. (Recommended)
- Please arrange these groups in the CV by **listing the most important categories of scholarly publication or dissemination in the candidate's field first**, followed by other categories in *descending order of importance* for this field, discipline, or area of expertise. (Required)
- Numbering each contribution and bolding your name is helpful for reviewers (Recommended)
- Please include the full reference, all author names and in the original order. (Required)
  - E.g., Author, A., Author B., & Author C., (YEAR). Title of Publication. Book/Journal/Conference, volume, page numbers.
- Please make sure your subheadings indicate what is peer-reviewed and what is not peer-reviewed. (Required)
  - E.g., Peer-Reviewed Conference Proceedings, Invited Talk (Not Peer-Reviewed)
- If authorship works in a particular way in your field, you may want to note that at the beginning of the section.
  - e.g., First authorship indicates the lead author on the entire project.
- For any publications, if you'd like to include information on the quality of the venue (e.g., journal impact factor), you can.
  - If not provided in the CV, the it needs to be provided somewhere else in your dossier.

## 11. Presentations at conferences, seminars, colloquia, and public audiences

- You may divide the list into appropriate groups, such as: Oral Presentations, Poster Presentations, Book Talks, Community Outreach, etc.
- Numbering each contribution and bolding your name is helpful for reviewers

(Recommended)

- Please include the full reference, all presenter names and in the original order.

(Required)

- Be sure to indicate if any co-authors are graduate or undergraduate students
- E.g., Presenter, A., Presenter B., & Presenter C., (YEAR). Title of Presentation. Conference/Organization, Location.
- Use subheadings to clarify which presentations are peer-reviewed and which are not. (Required)
- If available and applicable, you are welcome to provide acceptance rates for conferences (Recommended if readily available).

## 12. Public Scholarship Artifacts

- Please provide any scholarly works that are available online, to non-academic audiences, in specific communities, or in more popular press areas.
- This may be especially pertinent for scholarship of integration, application and practice, teaching and learning, and/or engagement.
- This can include things like: popular publications (e.g., op eds), dissemination of instructional materials, dissemination of teaching and learning assessment tools, software, websites, blogs, databases, podcasts, videos, digital humanities projects, Educational, Community, or Public Outreach Programs etc.).
- You may divide the list into appropriate groups as needed
- You may provide indicators of impact such as number of views, shares, likes, etc.

## 13. Scholarship in progress, including manuscripts submitted, in press, or in preparation

## 14. Fellowships and grants—Awarded, Pending, & Denied

- Please provide information on all fellowships and grants that are awarded, currently pending, or applied for but not received.
- Please indicate your role (PI, co-PI, Senior Personnel, Consultant, etc.) and include the name of all other PIs and Co-PIs (including where they are).
- Please indicate the sponsor, dates, and amounts of award or request.
  - For multiple PI/co-PI awards indicate level of contribution to the proposal and level of effort under the award

## 15. Post-doctoral advising, including dates of supervision and current position of advisees, if known

## 16. Patents awarded or pending

## 17. Consulting and/or Sustained Partnerships

- Provide any information on any consulting projects related to scholarship
- Provide any information on sustained partnerships with key stakeholders (e.g., communities).

## 18. Other Items

- Includes: start-ups, software packages developed, policy adaptations, approaches, methods, and/or tools adopted and/or assessed by others, generation of major gifts to

endow programs, etc.

19. Honors, awards and recognition related to scholarship/creativity

**Service**

*\* If you hold a leadership role in any of these categories, please indicate what that role was (e.g., Committee Chair and dates.. If you did significant work in any service area clarify what that work entailed (e.g., led committee, wrote motion, etc.).*

20. Service to WPI

- Use subheadings to identify the type of WPI service
  - E.g., Administrative Leadership, Campus-Wide, Department
- Include dates served and indicate any leadership roles (e.g., Chair, Secretary, etc.)
- Example activities: Faculty Search Committees, Staff Search Committees, Administrator Search Committees, Ad hoc task forces, University Committees, Departmental/Program Committees, Special Events (panels, workshops, open houses, etc.), Insight Advising; WPI Faculty Mentoring Programs, Advisor to student clubs, Greek life, academic groups, Accreditation activities, Professional Association Letter Writing, Student Recommendation/Reference Letter Writers.

21. Service to Profession

- Use Subheadings to identify the type of Professional Service
  - E.g., Memberships and offices held in professional societies, letter writing (e.g., External Reviewer), Ad hoc taskforces/committees in professional societies, etc.
- Include dates served and any leadership roles

22. Conference organization, editorial and referee services

- Use subheadings to identify activity
- Example Activities: Journal/Conference/Grant Reviewer, Organizer of conference, workshop, symposia, panels, Chair/Discussant for Conference Session, Editor or Editorial Board positions,
- Please clarify role for conference organization positions as chairing a session may mean different things (e.g., showing up versus running session).

23. Non-academic contributions to student welfare

- Example Activities: career guidance, graduate school guidance, informal mentoring/social support for students, student recruitment, advisor to student organization
- Please clarify role in activity.

24. Significant civic, cultural, religious, and similar contributions

- Example Activities: volunteer work for community, pro bono consulting, volunteer services to community
- Please clarify role in activity.

25. Honors, awards and recognition for service

**Other**

26. Other jobs and experiences

- If there are any other jobs or experiences that you believe are important to note, you can put those here.

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**CV TEMPLATE**

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**First Name Last Name**

**(CV in required format for WPI promotion)**

**100 Institute Road**

**SSPS Department, WPI**

**Worcester, MA 01609**

**508-831-XXX**

**xxxx@wpi.edu**

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**PROFESSIONAL EXPERIENCE**

**1. Education**

Degree School, Field, Year

Dissertation/Thesis: *Title*

Advisor: First Name Last Name

Degree School, Field, Year

Dissertation/Thesis: *Title*

Advisor: First Name Last Name

**2. Teaching Experience**

**Rank/Position**, Worcester Polytechnic Institute

YEAR-Present

**Example:**

**Assistant Professor of XXX**, Worcester Polytechnic Institute

YEAR-YEAR

\*See Section 5 for Courses





**Interactive Qualifying Projects (IQPs)**

This society-oriented project is a degree requirement for undergraduates and typically completed in the junior year. It can be completed off-campus or on-campus. It is equivalent to three or four courses (credit-wise).

1. Student Last Name, First Initial. (Academic Year). Title. Role (Advised/Co-Advised).
2. Student, K. & Student, J. (2022-2023). Title. Co-advised with First Name Last Name.
3. Student, K. & Student, J. (2022-2023). Title. Advised
4. Student, X., Student, Y., Student Z., Student, A. (YEAR). Titles Co-Advised with First Name Last Name. XXXX Project Center.

**Dissertations**

1. Student Last Name, First Initial. (Academic Year). Title. Role (Advised/Committee Member/Quals).
2. Student, M. (YEAR). Title. Ph.D Candidate in Discipline. Committee Member.
3. Student, A. (year). Title. M.S. (other Masers these degree) in discipline. Indicate advisor or Committee member.

**7. Independent Studies Conducted at WPI**

ISP Number	ISP Name	Term/Semester	Enrollment (# Students)	Additional Notes
XXX XXXX	XXXXXXXX	D XXXX	1	Minor Capstone
XXX XXXX	XXXXXXXX	D XXXX	1	
XXX XXXX	XXXXXXXX	D XXXX	1	

**8. Academic Advising at WPI**

YEAR                      Number Field Majors and Minors

2021-2022              XX Field Majors and Minors

**9. Honors, Awards, and Other Recognition Related to Teaching**

**Teaching Awards**

1. Name of Award (YEAR).

#### Teaching Award Nominations

1. Nominated for Name of Award (YEAR).

#### Teaching Honors

1. Teaching Honor

#### Invited Presentations Related to Teaching or Advising

1. Last Name, First Initial. (Month YEAR). *Title*. Location Given.
2. Last Name, First Initial. & Last Name, First Initial. (Month YEAR). *Title*. Location Given.

#### SCHOLARSHIP/CURRENCY

#### 10. Publications: Peer-Reviewed (\*Denotes authors contributed equally; double underline= Graduate Student Co-Author; single underline = Undergraduate Student Co-Author)

*Note: This section is for accepted, in press, or published articles, not preprints (they come later).*

#### Journal Articles

1. **Last Name 1, First Initial 1., Last Name 2, First Initial.** (YEAR). Title of article. *Title of Journal*. Volume, Number, pages. DOI (if available).
2. **Last Name 1, First Initial 1., Last Name 2, First Initial.** (YEAR). Title of article. *Title of Journal*. Volume, Number, pages. DOI (if available).
3. \*Last Name 1, First Initial 1., \***Last Name 2, First Initial.** (YEAR). Title of article. *Title of Journal*. Volume, Number, pages. DOI (if available).

#### Book Chapters

1. **Last Name 1, First Initial 1., Last Name 2, First Initial.** (YEAR). Title of chapter. In X. X. Last name, Last Name, X, (Eds). *Title of Book*. City, State/Country: Publisher.

#### Conference Proceedings

1. **Last Name 1, First Initial 1., Last Name 2, First Initial.** (YEAR). Title of article. In *Title of Conference*. DOI (if available).

## Op-Ed

1. Last Name, First Initial., Last Name 2, First Initials, & **Last, First Initial.** (Month XX, YEAR). Title of op-ed. *Title of Journal. Website URL (if available)*

## 11. Presentations at Conferences, Seminars, and Colloquia (\*Denotes authors contributed equally; double underline= Graduate Student Co-Author; single underline = Undergraduate Student Co-Author)

### Conference Presentations: Peer-Reviewed

#### Symposium Chaired or Co-Chaired

1. **Last, First Initial.** (Month Year). Title of symposium. Symposium presented at the YEAR *Title of Conference, Location.*

#### Oral Presentations

1. **Last Name, First Initials.** & Last Name2, First Initial2. (Month Year). Title of presentation. Presented at the YEAR *Title of Conference, Location.*

#### Poster Presentations

1. **Last Name, First Initials & Last Name2, First Initial2** (Month Year). Title of presentation. Presented at the YEAR *Title of Conference, Location.*

#### Invited Presentations Related to Scholarship

1. **Last, First Initials.** (Month YEAR). *Title of Presentation.*

## 12. Public Scholarship Artifacts

List scholarly works available online and to non-academic audiences

## 13. Scholarship in Progress (\*Denotes authors contributed equally; double underline= Graduate Student Co-Author; single underline = Undergraduate Student Co-Author)

### Manuscripts Currently Invited to Revise and Resubmit

1. Last, First Initials., Last, First Initials., Last, X. X., & **Last, A. B. M.** (revise and resubmit). Title of article/chapter.

### Manuscripts Currently Under Review and Preprints

1. Last, First Initials., Last, First Initials., Last, X. X., & **Last, A. B. M.** (revise and resubmit). Title of article/chapter.

## Manuscripts In Preparation

1. Last, First Initials., Last, First Initials., Last, X. X., & **Last, A. B. M.** (revise and resubmit). Title of article/chapter.

## 14. Fellowships and Grants—Awarded, Pending, and Denied (\*Denotes authors contributed equally; double underline= Graduate Student Co-Author; single underline = Undergraduate Student Co-Author)

### Awarded Grants as PI or Co-PI

1. Funding Agency (Year-Year). *Title of Grant*. **X. Last** (PI, Institutions) & Y. Last (Co-PI, Institution). \$X,XXX.

### Awarded Grants as Research Faculty, Consultant, Advisory Board, or Other Role

1. Funding Agency (Year-Year). *Title of Grant*. X. Last (PI, Institution), Y. Last<sup>2</sup> (Co-PI, Institution), & Z. Last (Co-PI, Institution). \$XXX,XXX.
  - a. **A. Last (Advisory Board)**.
2. Funding Agency (Year-Year). *Title of Grant*. A. Last (PI, Institution), B. Last (Co-PI, Institution), C. Last (Co-PI, Institution), D. Last (Co-PI, Institution), E. Last (Co-PI, Institution), F. Last (Sr. Pers.), & **G. Last** (Sr. Pers.), \$X,XXX.

### Pending Grants

1. Funding Agency (Year-Year). *Title of Grant*. **X. Last** (PI, Institutions) & Y. Last (Co-PI, Institution). Submitted Month Year. \$X,XXX.

### Grants In Preparation

1. Funding Agency (Year-Year). *Title of Grant*. **X. Last** (PI, Institutions) & Y. Last (Co-PI, Institution). \$X,XXX.

### Submitted but Not Funded Grants

1. Funding Agency (Year-Year). *Title of Grant*. **X. Last** (PI, Institutions) & Y. Last (Co-PI, Institution). \$X,XXX.

## 15. Post-doctoral advising

1. Last Name, First Name (Dates of Supervision). Current position (if known)

## 16. Patents

List both awarded patents and provisional patent applications.

### 17. Consulting

XXX Consultant. Self-Employed. Worcester, MA. YEAR-present

YYY Consultant. Organization Work For. City, State. 2016-Present

### 18. Other Items

Include items such as start-ups, software packages developed, policy adaptations, approaches, methods, and/or tools adopted and/or assessed by others, generation of major gifts to endow programs, etc.

### 19. Honors, Awards, and Recognition Related to Scholarship/Creativity Awards

Awarded Title of Award (YEAR)

Nominated for the Title of Award (YEAR)

### Press Coverage of Scholarship

1. Last, B. (Month XX, Year). Title of Article. *Title of Media Outlet*. Website (if available)

### SERVICE

### 20. WPI Administrative Leadership & Committee Assignments (Department or Campus-Wide)

#### WPI Administrative Leadership

Title of Service Year-Year

Name of Committee Year-Year

#### Campus-Wide Service

Title of Service Year-Year

Title of Committee Year-Year

\*Co-Chair XXXX-XXXX

**Department Service**

Title of Service Year-Year

Title of Committee Year-Year

\*Co-Chair XXXX-XXXX

**21. Profession Service**

Title of Service Year-Year

Name of Organization Year-Year

**Role (Year-Year)**

**Professional Society Memberships and Offices**

Professional Society Name (Year-Year); indicate if you serve in any society office.

**21. Conference Organization, Editorial, & Referee Services**

**Conference Organization**

Fall YEAR Hosted Name of Organization Conference (Location)

Spring YEAR Organized XXX Session at Name of Conference (Location)

**Editorial Positions**

Year-Year Name of Journal Editorial Board.

**Journal Manuscript Reviewer**

Year-Year Journal1, Journal2, Journal3

**Grant Proposal Reviewer**

YEAR Funding Agency

**Conference Reviewer**

YEAR Name of Conference

**22. Non-Academic Contributions to Student Welfare**

Title of Service Year-Year

Title of Service Year-Year

**23. Significant Civic, Cultural, Religious, and Similar Contributions**

Title of Service

Year-Year

Short description if needed.

**24. Honors, Awards, & Recognition for Service**

**OTHER**

**25. Other Jobs & Experiences**

If there are any other jobs or experiences that you believe are important to note, you can put those here.



#### E.4 For Nominators and Advocates: Example email soliciting an External Reviewer (for Research Track candidates)

Dear XXXX,

I am reaching out because you have been identified as an expert in your field, and I was hoping you would be willing to serve as an external reviewer for the promotion case of Dr. XXX XXXX. Dr. XXX XXX is under review for promotion from Associate Research Professor to Full Research Professor at Worcester Polytechnic Institute. Based on your area of scholarly expertise, your insights would be particularly helpful for this case.

I appreciate your consideration of this request to serve as an External Reviewer. I also understand that serving as an External Reviewer involves a great deal of your time, and that you may not be able to invest that time at the current time. If you have mentored or collaborated with Dr. XXX XXX then you are not eligible to serve as an External Reviewer, and I ask that you let me know so we can find someone else. If you are unavailable at the current time, but know someone else who may be a good fit, I'd appreciate if you could send me that name and contact information.

Reviews are due on August 15, XXXX.

Please let me know if you are willing to serve as an external reviewer by XXX. If you are able, then you will receive an official letter from our Faculty Governance Office. It will provide you with specific instructions for the review, our promotion policy which recognizes multiple forms of scholarship, along with the candidate's dossier and up to three scholarly artifacts. It will also be helpful if you can provide some information either in your letter or as an appendix of your qualification so that our promotions committee can see those qualifications.

Thank you in advance for considering this request. I look forward to hearing from you by XXXX.

Sincerely,

## E.5 Letter sent to External Reviewers by COAP

NOTE: THIS LETTER IS A TEMPLATE FROM PREVIOUS YEARS. THE ACTUAL LANGUAGE GETS UPDATED.

Dear Professor,

Thank you for agreeing to assist WPI's Committee on Appointments and Promotions in reviewing a candidate for promotion. **Professor** \_\_\_\_\_ has been nominated for promotion to the rank of Full Research Professor. Since the purpose of the review is to maintain outstanding faculty at WPI, the committee would appreciate your assessment of the degree to which the candidate has met WPI's promotion criteria for promotion to the rank of Full Research Professor.

For promotion to Full Research Professor, WPI expects high quality scholarship and "demonstrated considerable professional growth and development of qualities of leadership". The leadership component "must be recognized by peers within WPI, and by knowledgeable outside of WPI." At the end of this letter is a copy of WPI's *Criteria for Promotion in Academic Rank*. In addition to WPI's criteria, we are also providing you with the candidate's curriculum vitae, personal statement, scholarly artifacts, and a matrix of the different forms of scholarship. It is important to note that WPI recognizes multiple forms of scholarship in the promotion criteria including the scholarship of application and practice, discovery, engagement, integration, and teaching and learning.

As you conduct your review, please take into account the impact of the COVID-19 pandemic on the candidate's scholarship, teaching, and service from 2020-2022.

The committee is not asking you to recommend for or against promotion, but rather to share your opinions about the degree to which the candidate has met WPI's promotion criteria. Since all members of the committee will have reviewed the candidate's dossier, we are looking for more than a summary of the dossier. Specifically, we believe that you can help us understand the quality and external impact of the candidate's professional contributions, particularly in the area of scholarship. In other words, what the committee is particularly interested in hearing from you is an assessment of the quality and impact of the candidate's contributions to their disciplinary (or interdisciplinary) field.

In your letter, please also describe any professional relationship you have had (or now have) with the candidate. We would also appreciate a short one-page version of your current C.V., or a 1-2 paragraph bio-sketch so we can better understand your areas of expertise.

The committee appreciates your participation and looks forward to receiving your letter by **August 15, XXXX**. Please email your letter and one-page CV/short bio-sketch to Penny J. Rock, Faculty Governance Executive Assistant, at [prock@wpi.edu](mailto:prock@wpi.edu). The candidate is not aware of your participation in the review process and the information you provide will never be shared with the candidate.

Yours sincerely,  
Chair, Committee on Appointments and Promotions

## E.6 Letter sent to Professional Associates by COAP

NOTE: THIS LETTER IS A TEMPLATE FROM PREVIOUS YEARS. THE ACTUAL LANGUAGE GETS UPDATED.

Dear Professor,

Thank you for agreeing to assist WPI's Committee on Appointments and Promotions. Professor \_\_\_\_\_ has been nominated for promotion to the rank of Full Teaching/Research Professor. Since the purpose of the review is to maintain outstanding faculty at WPI, the Committee would appreciate your assessment of the degree to which the candidate has met WPI's promotion criteria for the rank of Full Teaching/Research Professor based on your professional interactions with the candidate.

For promotion to Full Teaching Professor, WPI expects high quality teaching and "demonstrated considerable professional growth and development of qualities of leadership". The leadership component "must be recognized by peers within WPI, and acknowledgement by external peers would be viewed favorably." At the end of this letter is a copy of WPI's *Criteria for Promotion in Academic Rank*. In addition to WPI's criteria, we are also providing you with the candidate's curriculum vitae, personal statement, teaching portfolio, and a matrix of the different forms of scholarship. It is important to note that WPI recognizes multiple forms of scholarship in the promotion criteria including the scholarship of application and practice, discovery, engagement, integration, and teaching and learning.

For promotion to Full Research Professor, WPI expects high quality scholarship and "demonstrated considerable professional growth and development of qualities of leadership". The leadership component "must be recognized by peers within WPI, and by knowledgeable outside of WPI." At the end of this letter is a copy of WPI's *Criteria for Promotion in Academic Rank*. In addition to WPI's criteria, we are also providing you with the candidate's curriculum vitae, personal statement, scholarly artifacts, and a matrix of the different forms of scholarship. It is important to note that WPI recognizes multiple forms of scholarship in the promotion criteria including the scholarship of application and practice, discovery, engagement, integration, and teaching and learning.

As you conduct your review, please take into account the impact of the COVID-19 pandemic on the candidate's teaching, scholarship, and/or service from 2020-2022.

The committee is not asking you to recommend for or against promotion, but rather to share your opinions about the degree to which the candidate has met WPI's promotion criteria based on your professional interactions with the candidate. Since the committee will review the candidate's dossier, we are looking for more than a summary of the dossier. Rather, the committee is particularly interested in hearing from about the quality and impact of the candidate's contributions to areas of teaching, scholarship, and/or service based on the efforts or activities in which you were personally involved. You do not need to comment on all areas of the criteria (teaching, scholarship, and service). Instead, we welcome comments on whatever areas are most relevant to your review based on your professional interactions with the candidate as this will provide context and will be very helpful to the committee. Please describe the professional relationship that you have had (or now have) with the candidate in your letter. It will also be helpful for the committee if you include a one-page version of your curriculum vitae or a 1-2 paragraph bio-sketch.

Although the candidate, having selected you as a Professional Associate, is aware of your involvement of the review process, the information you provide will never be shared with the candidate. Thus, the information you provide is confidential.

The committee appreciates your participation and looks forward to receiving your letter by **August 15, XXXX**. Please email your letter and one-page CV/short bio-sketch to Penny J. Rock, Faculty Governance Executive Assistant, at [prock@wpi.edu](mailto:prock@wpi.edu).

Yours sincerely,

Chair, Committee on Appointments and Promotions

## E.7 Survey sent by Faculty Governance Coordinator to former students

Promotion review for: **XXXX**

**XXXX** WPI Faculty Web page can be found here: **XXX**

We would like your input on **XXXX**, who is a candidate for promotion. One of the criteria for promotion at WPI is high-quality teaching.

According to WPI's records, **XXXX** taught or advised one of your courses or projects. We would appreciate hearing your views of the candidate's teaching or advising via this survey. Written comments are particularly helpful. We are not asking you to recommend for or against promotion. Rather, we are asking you to share your opinions about the candidate's strengths and weaknesses based on your experiences with them (either in the classroom or through project advising).

The information you provide is anonymous and will be kept strictly confidential. Your name is not linked with your response and **XXXXXX** will never see the information you provide or know you responded.

Please complete the survey by August 1, XXXX

1. Please indicate which course or project you took with Prof. XX
2. My overall rating of their teaching/advising is: (1 = Poor/Low Rating; 5 = Excellent/Very High Rating)
3. In addition to your overall rating, we would like to learn about your perceptions of the overall classroom/advising climate (e.g., respectful, motivating, engaging) and the accessibility of the faculty member during your time working with them.
4. How would you rate the classroom/advising climate and accessibility of the faculty member? (1 = Poor/Low Rating; 5 = Excellent/Very High Rating)
5. Now we would like you to think about your learning experience with this faculty member in terms of what you learned, the importance of that knowledge/skills and how the faculty member engaged you in that learning (e.g., methods and assessments used).
6. What was your learning experience like with the faculty member? (1 = Poor/Low Rating; 5 = Excellent/Very High Rating)
7. Based on your experiences with this faculty member, what were their greatest strengths in the classroom or in project advising? (open-ended)
8. Based on your experiences with this faculty member, what were their greatest weaknesses in the classroom or in project advising? (open-ended)
9. What did you learn from this faculty member that has been the most useful or memorable for you? (open-ended)

Thank you for taking the time to provide your insights. Your input will be very helpful to us. We also want to remind you that your responses are completely anonymous and cannot be linked to your name

and that the candidate will never see your responses or know that you have responded. Thank you again for your time and insights!

## E.8 Sample Promotion Dossiers

### Guide to Sample Promotion Dossiers

Since the sample dossiers are large, we will not paste them into this guide. Currently, we only have examples for Full Teaching Professors. If you would like view them, please view them on the ADVANCE Canvas page: [https://canvas.wpi.edu/courses/14049/pages/promotions-to-full-teaching-professor?module\\_item\\_id=361209](https://canvas.wpi.edu/courses/14049/pages/promotions-to-full-teaching-professor?module_item_id=361209)

The examples were selected and solicited by two members of the Committee on Appointments and Promotions (COAP) serving on the ADVANCE TTT working group in Summer 2019. Do not share these examples with anyone outside WPI without direct permission from the relevant Professor.

#### Important notes:

- Guidance and expectations for promotion may change over time. All candidates are encouraged to attend annual meetings presented by COAP to stay up-to-date on the most current guidance and to solicit feedback from their nominator and advocate as they are preparing their promotion package.