

## Annual Faculty Evaluation Cycle Timeline

### Final Approval: December 13, 2021,

as amended February 2022 to update the “Office of Faculty Affairs” (formerly, Dean of Faculties)

To supplement the Texas A&M University at Galveston [Faculty Evaluation Guidelines](#), this timeline document outlines the entire “annual faculty evaluation cycle” which is comprised of the annual review with the Department Head, promotion and tenure, mid-term review and post tenure review processes. Do not solely rely upon this document. **Always refer to the following guideline documents for more complete information and details.**

- (1) Home department’s Faculty Evaluation Guidelines  
<https://facultyaffairs.tamu.edu/Career/Faculty-Evaluation-Guidelines>
- (2) Texas A&M University at Galveston’s Faculty Evaluation Guidelines  
<https://www.tamug.edu/AcademicAffairs/FacultyEvaluation.html>
- (3) Office of Faculty Affairs Promotion and Tenure Submission Guidelines  
<https://facultyaffairs.tamu.edu/Career/Promotion-and-Tenure>

Evaluation Type**	General Description
Annual Review	All faculty, full and part time, must undergo an annual review from their Department Head. The Galveston Campus utilizes a G1/G2 format to conduct this review. A current CV and supporting artifacts for teaching, research and service should also accompany the G1 form.
<i>Cycle Evaluations</i>	<i>All cycle evaluation types listed below</i>
Mandatory Consideration, Tenure Track	Any Assistant or Associate Professor on tenure track must submit their promotion with tenure dossier for consideration during the mandatory consideration year as indicated on their Tenure Track Agreement, or as amended by an approved Tenure Clock Extension Request.
Promotion, Tenured	Any tenured Associate Professor seeking promotion to full Professor.
Promotion, Academic Professional Track	Any level of Academic Professional Track faculty seeking promotion to the next level.
Mid Term Review, Tenure Track	Assistant Professor or Associate Professor on tenure track to be reviewed in their third year regarding progress towards promotion with tenure.
Mid Term Review, Academic Professional Track	Assistant or Associate Professor level Academic Professional Track faculty to be reviewed in their third year since initial hire to provide guidance on their progress towards promotion. <i>Currently, this is an optional review.</i>
Post Tenure Review	All tenured Associate Professors and full Professors require a peer review at least once every six years.

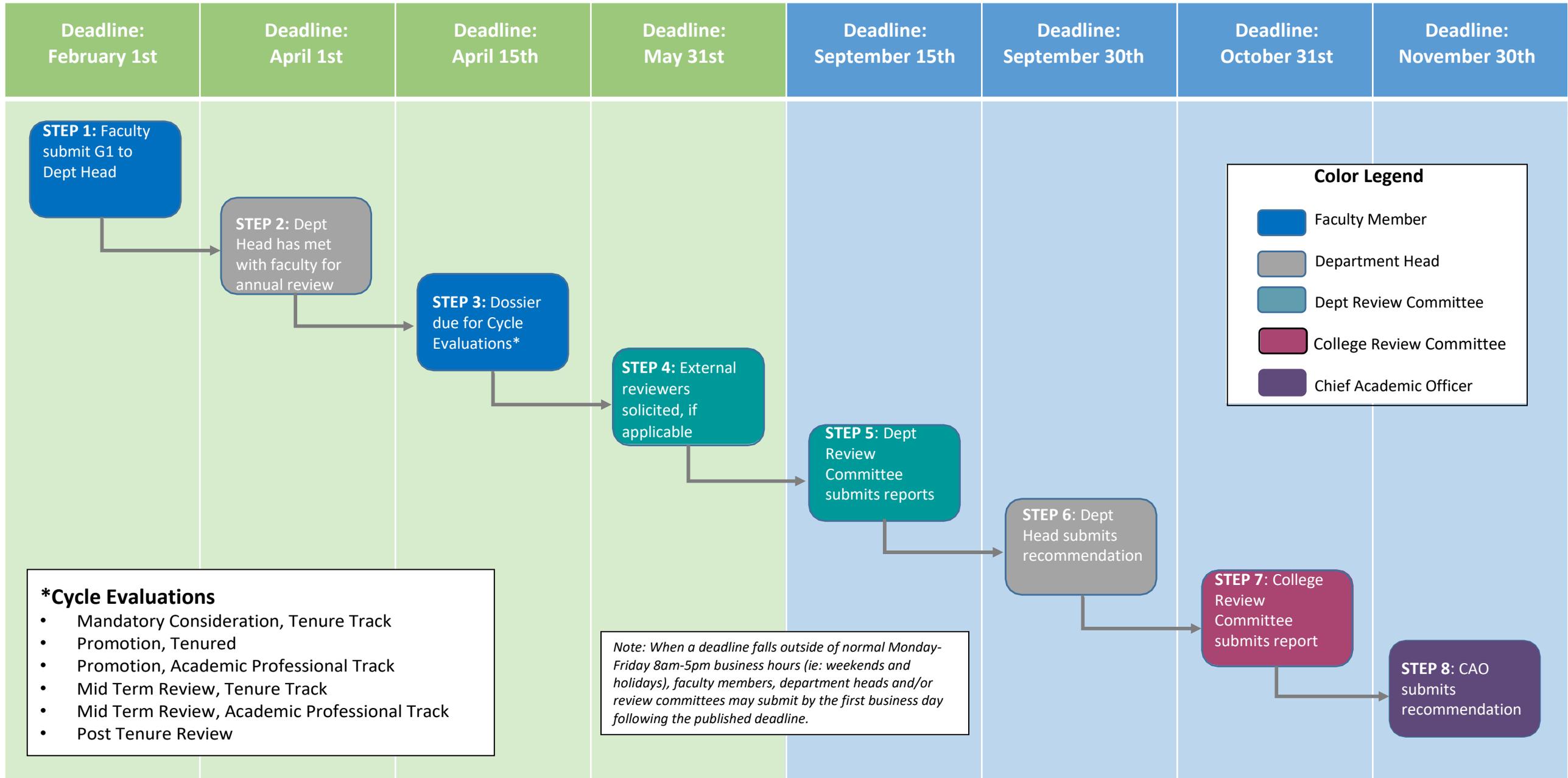
\*\*All types of faculty evaluations will utilize the web based Interfolio Review, Promotion and Tenure module to route the annual review G1/G2 documents and dossier materials through each stage of the applicable process. In the rare event that we have a “Tenure Only” case, the “Mandatory Consideration, Tenure Track” process will be followed.



# Faculty Cycle Evaluations Workflow

SPRING

FALL



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*Note: When a deadline falls outside of normal Monday-Friday 8am-5pm business hours (ie: weekends and holidays), faculty members, department heads and/or review committees may submit by the first business day following the published deadline.*

Timeline / Deadline	Action
<p><b>December</b> (of the calendar year to be evaluated for annual reviews)</p>	<p>Current generic G1 document format available to faculty starting the annual review process. For the current generic G1 document, visit <a href="https://www.tamug.edu/AcademicAffairs/FacultyEvaluation.html">https://www.tamug.edu/AcademicAffairs/FacultyEvaluation.html</a>.</p> <p>For departments that have their own customized G1 document, do not use the generic version. Faculty should check with their department head if they do not have the latest departmental required version.</p> <p>Individual faculty "Candidate" cases for the annual review will be created in Interfolio.</p> <p><i>If changed from the previous cycle</i>, Department Heads to notify Chief Academic Officer's (CAO) office of supporting materials and documentation relating to teaching effectiveness; research, scholarly or creative activities effectiveness; and evaluation of service that faculty are expected to submit as part of the promotion and tenure, mid-term review and post tenure review processes. This is important so Interfolio can be customized accordingly before the cycle begins in March/April. This information should already be available to all faculty within the departmental faculty evaluation guidelines.</p>
<p><b>January</b></p>	<p>CAO office to host a Department Head retreat relating to the annual evaluation cycle and other Academic Affairs priorities.</p> <p>Faculty may also choose to review promotion and tenure workshop materials from the Office of Faculty Affairs (or attend a workshop, when offered later in the spring), to help prepare for their annual evaluation discussion with the Department Head relating to their promotion efforts.</p> <p>Faculty need to ensure that they can access Interfolio. Report any issues to your Department Head immediately. <a href="https://dof.tamu.edu/dof/media/DOF-Media/Documents/DOF%20Guidelines/Interfolio-Login-Guidelines.pdf">https://dof.tamu.edu/dof/media/DOF-Media/Documents/DOF%20Guidelines/Interfolio-Login-Guidelines.pdf</a></p>
<p><b>February 1<sup>st</sup></b></p>	<p><b>Faculty deadline to submit the G1 document to the Department Head</b> in Interfolio outlining faculty member achievements and accomplishments for the previous calendar year. A current CV is also required.</p>
<p><b>February</b></p>	<p>CAO office to host at least 2 open question and answer sessions for faculty; one targeting Tenure Track and Tenured faculty and one targeting Academic Professional Track faculty.</p>
<p><b>February - March</b></p>	<p>During this time frame, Department Head meets with faculty member regarding the G1 annual review and provides a G2 annual review document to the faculty member that contains the Department Head's assessment and feedback, of the progress towards promotion and/or tenure or post tenure productivity. G2 is signed by both Department Head and faculty member to acknowledge the meeting occurred.</p> <p>During the annual review meeting, the Department Head advises the faculty member of the process and expectations for seeking promotion or that the faculty member is due for mandatory consideration, mid-term review or post tenure review.</p> <p>Faculty going up for a cycle evaluation (promotion and/or tenure, mid-term, or post tenure review) should be compiling their dossier materials.</p>

# Annual Faculty Evaluation Cycle Timeline

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Timeline / Deadline	Action
<b>March</b>	<p>The Office of Faculty Affairs publishes the annual Promotion and Tenure cycle guidelines and deadlines no later than April 1<sup>st</sup> each year. The Interfolio templates are also set up by the Office of Faculty Affairs for college/department use. Cases cannot be created for individual faculty members until the Office of Faculty Affairs releases the cycle's Interfolio case templates.</p> <p>The Office of Faculty Affairs also typically hosts a mandatory meeting for the CAO, College Review Committee chair, Department Heads and Department Review Committee chairs.</p>
<b>April 1<sup>st</sup></b>	<p><b>Department Head deadline to submit all G2 faculty annual reviews</b> in Interfolio to the Department Administrator step. This closes the faculty annual review cycle; all faculty have been evaluated for the previous calendar year.</p> <p>Extensions up to May 31<sup>st</sup> may be granted by the CAO upon written request by a Department Head, if the faculty member(s) involved is not undergoing a cycle evaluation (promotion and/or tenure, mid-term, or post tenure review). Refer to <a href="#">Addendum I</a> for further details to close out the annual evaluation cycle.</p>
<b>April</b>	<p>Department Heads will notify the CAO office of the faculty who will be submitting dossiers for a <a href="#">cycle evaluation type</a>.</p> <p>Department Heads will establish their Department Review Committee and advise the CAO office of the membership so the College Administrator can build the appropriate committee membership structure in Interfolio accordingly.</p> <p>The CAO will finalize the membership of the College Review Committee and the College Administrator will build the appropriate committee membership structure in Interfolio accordingly.</p> <p>Individual faculty "Candidate" cases will be created in Interfolio by the College Administrator to house and route the dossiers. Faculty member will receive an auto-generated email that their case is ready for use.</p> <p>Workshop for all Department Review Committee chairs will be hosted by the CAO office as soon as practical after the mandatory meeting hosted by the Office of Faculty Affairs in March.</p>

# Annual Faculty Evaluation Cycle Timeline

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Timeline / Deadline	Action
<p><b>April 15<sup>th</sup></b></p>	<p><b>Candidate Deadline for dossier submission</b> to the Department Administrator in Interfolio for all <a href="#">cycle evaluation types</a>.</p> <p><i>Click the applicable type of evaluation below to navigate to the Candidate document requirements.</i></p> <ul style="list-style-type: none"> <li>• <a href="#">Mandatory Consideration, Tenure Track</a></li> <li>• <a href="#">Tenured, Promotion</a></li> <li>• <a href="#">Promotion, Academic Professional Track</a></li> <li>• <a href="#">Mid-Term Review, Tenure Track</a></li> <li>• <a href="#">Mid-Term Review, Academic Professional Track</a></li> <li>• <a href="#">Post Tenure Review</a></li> </ul> <p>Assuming all dossier contents are in good order as required by <a href="#">governing guidelines</a>, the Department Administrator will forward the case to the Department Review Committee step in Interfolio.</p> <p>If the dossier contents are not in good order, the Department Administrator will unlock the applicable Candidate sections in Interfolio, then work with the Department Head to have the Candidate correct their documents and <b>resubmit promptly</b> so the case can move forward to the Department Review Committee step.</p>
<p><b>April - May</b></p>	<p>Once a Candidate case has progressed to the Department Review Committee step in Interfolio, the committee’s review, analysis, and evaluation of the case begins.</p> <p>The Department Review Committee will also begin the External Reviewers process for “Mandatory Consideration, Tenure Track” and “Promotion, Tenured” cases.</p> <p><b>The CAO must approve all external reviewers prior to request letters being sent.</b> Send the External Reviewers Chart (<a href="https://facultyaffairs.tamu.edu/Faculty-Affairs/Forms-Templates">https://facultyaffairs.tamu.edu/Faculty-Affairs/Forms-Templates</a>) and attach the short biography of each reviewer. For any external reviewers who are not from peer or aspirational peer universities, a justification in the form of program ranking and expertise credentials are expected and should be included in the biography of the external reviewer.</p> <p>Departments are encouraged to utilize Interfolio’s optional feature to solicit the external reviewers’ letters as opposed to manually emailing outside of Interfolio.  <a href="https://dof.tamu.edu/dof/media/DOF-Media/Documents/Interfolio/Interfolio%20RPT/P-T-Interfolio-How-to-Request-an-External-Evaluation-through-an-RPT-Case.pdf">https://dof.tamu.edu/dof/media/DOF-Media/Documents/Interfolio/Interfolio%20RPT/P-T-Interfolio-How-to-Request-an-External-Evaluation-through-an-RPT-Case.pdf</a></p> <p>The External Reviewers process may require action by the Department Review Committee and/or the Department Head over the summer months to help ensure timely receipt of letters before the fall semester begins.</p>
<p><b>First Day of the Fall Semester</b> (mid-late August)</p>	<p>Department Review Committees resume review, analysis, and evaluation of all Candidate cases for the cycle and writes applicable reports following all <a href="#">governing guidelines</a>.</p>

# Annual Faculty Evaluation Cycle Timeline

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Timeline / Deadline	Action
<b>September 15<sup>th</sup></b>	<p><b>Department Review Committee deadline</b> to submit required reports and recommendation for each Candidate’s case in Interfolio.</p> <ul style="list-style-type: none"> <li>• Teaching Report, including the synthetic analysis of student evaluations, chronologically and in tabular form</li> <li>• Research, Scholarly and Creative Activities Report*</li> <li>• Service Report</li> <li>• Department Review Committee Discussion and Recommendation Report</li> </ul> <p><i>*Note Academic Professional Track (APT) faculty are only evaluated in two dimensions, so a total of three Department Review Committee reports are required for APT promotion and mid-term review cases.</i></p>
<b>September 30<sup>th</sup></b>	Department Head Recommendation letter due in Interfolio for all cases.
<b>October 31<sup>st</sup></b>	College Review Committee Report and Recommendation due in Interfolio for all cases.
<b>November 30<sup>th</sup></b>	CAO Recommendation Report due in Interfolio for all cases.
<b>December</b>	<p>All promotion and tenure cases submitted to “Faculty Affairs Staff Review” level in Interfolio. Deadline set annually, typically first week of December. Prior to submitting to Faculty Affairs, the College Administrator will ensure the dossier coversheet is uploaded accordingly with the college level outcomes and voting for each case.</p> <p>All “Mid-Term, Tenure Track; Mid-Term, Academic Professional Track”; and “Post Tenure Review” cases complete and closed in Interfolio.</p> <p>Annual Review process starts over with G1 form available to faculty and due to the Department Head by February 1<sup>st</sup>. <i>Refer back to beginning of this timeline for continuance of the annual evaluation process and the faculty annual evaluation cycle.</i></p>
<b>December continued</b>	<p>CAO sets meeting with faculty member and Department Head for Mid Term, Tenure Track cases to discuss progress towards promotion with tenure.</p> <p>CAO sets meeting with faculty member and Department Head for Mid Term, Academic Professional Track cases to discuss progress towards promotion.</p>
<b>January</b> (of following year)	Office of Faculty Affairs meets with CAO to discuss recommendations for all promotion and tenure cases.
<b>January - February</b> (of following year)	Provost forwards recommendations to University President on all promotion and tenure cases. University President forwards recommendations for all promotion and tenure cases to the Board of Regents.
<b>February – March</b> (of following year)	All “Mid-Term, Academic Professional Track” faculty case follow-up by the Department Head will occur no later than during the faculty member’s annual review meeting.
<b>April - May</b> (of following year)	Board of Regents reviews recommendations and makes final decisions on tenure cases.
<b>May 31<sup>st</sup></b> (of following year)	All post tenure reviews are complete well before the System mandated deadline.
<b>September 1</b> (of following year)	<p>Promotion and Tenure effective for successful cases.</p> <p>Six-year peer review clock resets for “Post Tenure Review” cases.</p>

## Related Statutes, Policies, or Requirements

[University Rule 12.01.99.M1 University Statement on Academic Freedom, Responsibility, Tenure and Promotion](#)

[Standard Administrative Procedure 12.06.99.M0.01 Post-Tenure Review](#)

[University Guidelines for Annual and Mid-Term Review](#)

[University Promotion and Tenure Submission Guidelines](#)

[Interfolio Review, Promotion and Tenure Guides](#)

### **Addendum Resources**

- A. [Mandatory Consideration, Tenure Track Document Checklist](#)  
[Tenured, Promotion Document Checklist](#)
- B. [Promotion, Academic Professional Track Document Checklist](#)
- C. [Mid-Term Review, Tenure Track Document Checklist](#)
- D. [Mid-Term Review, Academic Professional Track Document Checklist](#)
- E. [Post Tenure Review Document Checklist](#)
- F. [Department Review Committee Document Checklist](#)
- G. [Department Document Checklist](#)
- H. [College Document Checklist](#)
- I. [Interfolio Annual Evaluation Steps](#)
- J. [Interfolio Cycle Evaluation Steps](#)

**Candidate Dossier Packet Requirements by Evaluation Type**

**Candidate Dossiers Due April 15<sup>th</sup> Annually**

**Addendum A**

**Mandatory Consideration, Tenure Track and Promotion, Tenured**

- Candidate Statement on Teaching, Research or Other Scholarly or Creative Activities, and Service**
  - 3 typed pages maximum; single-spaced; 10pt font minimum; 1-inch margins
  - Explains the quality, productivity overtime and impact within each area of responsibility (ie: teaching, research/scholarly or creative work, and service accomplishments).
  - Refer to Appendix II in the [University Promotion and Tenure Guidelines](#) on writing an impact statement.
- Curriculum Vitae**
  - Concise overview of academic accomplishments; reflecting experiences and development in career as a teacher and scholar; annotate as needed to highlight impact of work and specific contributions.
  - Include a signed and dated statement: *"This CV submitted is most current and correct as of the date of this signature."*; appended onto the end of the CV.
- Grants Summary Chart**
  - Upload [Grants Summary Chart](#) as an Excel file.
  - Accurately list grant information with most recent listed first; may include career long awards.
  - Be sure grants chart and associated details listed in CV are congruent.
- Verification of Contents Statement**
  - Statement that accurately describes a list of all materials the Candidate has submitted to the Department Review Committee for the purpose of promotion and/or tenure, mid-term, or post tenure review consideration.
  - Upload a single PDF file, listing all materials being submitting for review; preferably signed and dated.
- Faculty Data Table**
  - Upload [Faculty Data Table](#), limited to one page in length.
  - Should include information since last promotion, or since hire for those being reviewed for their first promotion and/or tenure, with career totals in parenthesis.
  - Leave table cells blank if they do not apply.
- Faculty Biography**
  - Upload 200-word maximum biography in a Word document.
  - Refer to [University Promotion & Tenure Guidelines](#) for content details.
- Candidate External Reviewer Checklist**
  - Upload [Candidate External Reviewer Checklist](#).
  - Arm's length scholars at or above the rank of the candidate from peer or aspiring institutions who do not have a vested interest in the outcome and therefore can provide an objective and unbiased review.
- Other Teaching Related Materials**
  - Upload materials and supporting documentation related to teaching efforts.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided (ie: student evaluations, teaching portfolio, sample syllabi, exams, etc.).
- Other Research, Scholarly and Creative Works**
  - Upload materials related to research, scholarly and/or creative works.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided.
- Other Service-Related Materials**
  - Upload materials and supporting documentation related to service.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided.
- Tab 13: Candidate OTHER Materials and Documentation**
  - May include other materials and supporting documentation deemed pertinent to the case, but not appropriate for placement elsewhere (ie: annual evaluations). **Candidates may opt to include a COVID-19 impact statement. Refer to Appendix IX in the [University Promotion & Tenure Guidelines](#) for information about what faculty might want to include in an optional COVID-19 impact statement. Candidates may choose whether or not to include their optional COVID-19 impact statement with materials that are sent to external reviewers.**

**Candidate Dossier Packet Requirements by Evaluation Type**

**Candidate Dossiers Due April 15<sup>th</sup> Annually**

**Addendum B**

**Promotion, Academic Professional Track**

- Candidate Statement on Teaching, Research or Other Scholarly or Creative Activities, and Service**
  - 3 typed pages maximum; single-spaced; 10pt font minimum; 1-inch margins
  - Explains the quality, productivity overtime and impact within each area of responsibility (ie: teaching and service accomplishments).
  - Refer to Appendix II in the [University Promotion and Tenure Guidelines](#) on writing an impact statement.
- Curriculum Vitae**
  - Concise overview of academic accomplishments; reflecting experiences and development in career as a teacher; annotate as needed to highlight impact of work and specific contributions.
  - Include a signed and dated statement: *"This CV submitted is most current and correct as of the date of this signature."*; appended onto the end of the CV.
- Grants Summary Chart**
  - Upload [Grants Summary Chart](#) as an Excel file; as an APT faculty member is not required to be active in research, scholarly or creative activities, if there are no grants to list, fill out form header and indicate N/A in the table body.
  - Accurately list grant information with most recent listed first; may include career long awards.
  - Be sure grants chart and associated details listed in CV are congruent.
- Verification of Contents Statement**
  - Statement that accurately describes a list of all materials the Candidate has submitted to the Department Review Committee for the purpose of promotion and/or tenure, mid-term, or post tenure review consideration.
  - Upload a single PDF file, listing all materials being submitting for review; preferably signed and dated.
- Faculty Data Table**
  - Upload [Faculty Data Table](#), limited to one page in length.
  - Should include information since last promotion, or since hire for those being reviewed for their first promotion and/or tenure, with career totals in parenthesis.
  - Leave table cells blank if they do not apply.
- Faculty Biography**
  - Upload 200-word maximum biography in a Word document.
  - Refer to [University Promotion & Tenure Guidelines](#) for content details.
- Other Teaching Related Materials**
  - Upload materials and supporting documentation related to teaching efforts.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided (ie: student evaluations, teaching portfolio, sample syllabi, exams, etc.).
- Other Service-Related Materials**
  - Upload materials and supporting documentation related to service.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided.
- Tab 13: Candidate OTHER Materials and Documentation**
  - May include other materials and supporting documentation deemed pertinent to the case, but not appropriate for placement elsewhere (ie: annual evaluations). **Candidates may opt to include a COVID-19 impact statement. Refer to Appendix IX in the [University Promotion & Tenure Guidelines](#) for information about what faculty might want to include in an optional COVID-19 impact statement.**

**Candidate Dossier Packet Requirements by Evaluation Type**

**Candidate Dossiers Due April 15<sup>th</sup> Annually**

**Addendum C**

**Mid-Term Review, Tenure Track**

- Candidate Statement on Teaching, Research or Other Scholarly or Creative Activities, and Service**
  - 3 typed pages maximum; single-spaced; 10pt font minimum; 1-inch margins.
  - Explains the quality, productivity overtime and impact within each area of responsibility (ie: teaching, research/scholarly or creative work, and service accomplishments).
  - Refer to Appendix II in the [University Promotion and Tenure Guidelines](#) on writing an impact statement.
- Curriculum Vitae**
  - Concise overview of academic accomplishments; reflecting experiences and development in career as a teacher and scholar; annotate as needed to highlight impact of work and specific contributions.
  - Include a signed and dated statement: *"This CV submitted is most current and correct as of the date of this signature."*; appended onto the end of the CV.
- Grants Summary Chart**
  - Upload [Grants Summary Chart](#) as an Excel file.
  - Accurately list grant information with most recent listed first; may include career long awards.
  - Be sure grants chart and associated details listed in CV are congruent.
- Verification of Contents Statement**
  - Statement that accurately describes a list of all materials the Candidate has submitted to the Department Review Committee for the purpose of promotion and/or tenure, mid-term, or post tenure review consideration.
  - Upload a single PDF file, listing all materials being submitting for review; preferably signed and dated.
- Faculty Data Table**
  - Upload [Faculty Data Table](#), limited to one page in length.
  - Should include information since last promotion, or since hire for those being reviewed for their first promotion and/or tenure, with career totals in parenthesis.
  - Leave table cells blank if they do not apply.
- Faculty Biography**
  - Upload 200-word maximum biography in a Word document.
  - Refer to [University Promotion & Tenure Guidelines](#) for content details.
- External Reviewer's Checklist**
  - Upload [Candidate External Reviewer Checklist](#) of potential reviewers for future mandatory consideration. Note: no external reviewer's letters will be solicited. Checklist is provided for departmental feedback as part of the mid-term review process.
  - Arm's length scholars at or above the rank of the candidate from peer or aspiring institutions who do not have a vested interest in the outcome and therefore can provide an objective and unbiased review.
- Other Teaching Related Materials**
  - Upload materials and supporting documentation related to teaching efforts.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided (ie: student evaluations, teaching portfolio, sample syllabi, exams, etc.).
- Other Research, Scholarly and Creative Works**
  - Upload materials related to research, scholarly and/or creative works.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided.
- Other Service-Related Materials**
  - Upload materials and supporting documentation related to service.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided.
- Tab 13: Candidate OTHER Materials and Documentation**
  - May include other materials and supporting documentation deemed pertinent to the case, but not appropriate for placement elsewhere (ie: annual evaluations). **Candidates may opt to include a COVID-19 impact statement. Refer to Appendix IX in the [University Promotion & Tenure Guidelines](#) for information about what faculty might want to include in an optional COVID-19 impact statement.**

**Candidate Dossier Packet Requirements by Evaluation Type**

**Candidate Dossiers Due April 15<sup>th</sup> Annually**

## Addendum D

### Mid-Term Review, Academic Professional Track

Currently, mid-term reviews of APT faculty are strongly encouraged, but are not mandatory. A potential benefit of performing an APT mid-term review is to obtain early feedback and guidance from the various stages of review regarding the trajectory towards eventual promotion.

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  - 3 typed pages maximum; single-spaced; 10pt font minimum; 1-inch margins.
  - Explains the quality, productivity overtime and impact within each area of responsibility (ie: teaching, research/scholarly or creative work, and service accomplishments).
  - Refer to Appendix II in the [University Promotion and Tenure Guidelines](#) on writing an impact statement.
- Curriculum Vitae**
  - Concise overview of academic accomplishments; reflecting experiences and development in career as a teacher and scholar; annotate as needed to highlight impact of work and specific contributions.
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- Grants Summary Chart**
  - Upload [Grants Summary Chart](#) as an Excel file; as an APT faculty member is not required to be active in research, scholarly or creative activities, if there are no grants to list, fill out form header and indicate N/A in the table body.
  - Accurately list grant information with most recent listed first; may include career long awards.
  - Be sure grants chart and associated details listed in CV are congruent.
- Verification of Contents Statement**
  - Statement that accurately describes a list of all materials the Candidate has submitted to the Department Review Committee for the purpose of promotion and/or tenure, mid-term, or post tenure review consideration.
  - Upload a single PDF file, listing all materials being submitting for review; preferably signed and dated.
- Other Teaching Related Materials**
  - Upload materials and supporting documentation related to teaching efforts.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided (ie: student evaluations, teaching portfolio, sample syllabi, exams, etc.).
- Other Service-Related Materials**
  - Upload materials and supporting documentation related to service.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided.
- Tab 13: Candidate OTHER Materials and Documentation**
  - May include other materials and supporting documentation deemed pertinent to the case, but not appropriate for placement elsewhere (ie: annual evaluations). **Candidates may opt to include a COVID-19 impact statement. Refer to Appendix IX in the [University Promotion & Tenure Guidelines](#) for information about what faculty might want to include in an optional COVID-19 impact statement.**

Candidate Dossier Packet Requirements by Evaluation Type

Candidate Dossiers Due April 15<sup>th</sup> Annually

**Addendum E**

**Post Tenure Review**

- Candidate Statement on Teaching, Research or Other Scholarly or Creative Activities, and Service**
  - 3 typed pages maximum; single-spaced; 10pt font minimum; 1-inch margins
  - Explains the quality, productivity overtime and impact within each area of responsibility (ie: teaching, research/scholarly or creative work, and service accomplishments) since last promotion or post tenure review.
  - Refer to Appendix II in the [University Promotion and Tenure Guidelines](#) on writing an impact statement.
- Curriculum Vitae**
  - Concise overview of academic accomplishments; reflecting experiences and development in career as a teacher and scholar; annotate as needed to highlight impact of work and specific contributions.
  - Include a signed and dated statement: *"This CV submitted is most current and correct as of the date of this signature."*; appended onto the end of the CV.
- Grants Summary Chart**
  - Upload [Grants Summary Chart](#) as an Excel file.
  - Accurately list grant information with most recent listed first; may include career long awards.
  - Be sure grants chart and associated details listed in CV are congruent.
- Verification of Contents Statement**
  - Statement that accurately describes a list of all materials the Candidate has submitted to the Department Review Committee for the purpose of promotion and/or tenure, mid-term, or post tenure review consideration.
  - Upload a single PDF file, listing all materials being submitting for review; preferably signed and dated.
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  - Upload materials and supporting documentation related to teaching efforts.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided (ie: student evaluations, teaching portfolio, sample syllabi, exams, etc.).
- Other Research, Scholarly and Creative Works**
  - Upload materials related to research, scholarly and/or creative works.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided.
- Other Service-Related Materials**
  - Upload materials and supporting documentation related to service.
  - Departmental Faculty Evaluation Guidelines may require specific documentation to be provided.
- Tab 13: Candidate OTHER Materials and Documentation**
  - May include other materials and supporting documentation deemed pertinent to the case, but not appropriate for placement elsewhere (ie: annual evaluations). **Candidates may opt to include a COVID-19 impact statement. Refer to Appendix IX in the [University Promotion & Tenure Guidelines](#) for information about what faculty might want to include in an optional COVID-19 impact statement.**

## Dossier Document Requirements for Department Review Committee

Reports Due September 15<sup>th</sup> Annually

### Addendum F

#### APRIL

##### Department External Reviewer Checklist

- Complete the [Department External Reviewer Checklist](#) for “Mandatory Consideration, Tenure Track” and “Promotion, Tenured” cases and submit to Department Head.
- Arm's length scholars at or above the rank of the candidate from peer or aspiring institutions who do not have a vested interest in the outcome and therefore can provide an objective and unbiased review.

##### Candidate dossiers submitted to the Department Administrator by April 15<sup>th</sup>

- After ensuring all required documents meet [governing guidelines](#) and are uploaded to the Candidate’s case, the dossier will be forwarded to the Department Review Committee level.

##### Department Review Committee begins reviewing Candidate Dossiers

- Should the department review committee need additional documentation from the candidate or require a revision to an existing document, the Department Administrator can “unlock” the applicable section of the Candidate’s case in Interfolio and the Candidate can upload the additional documentation or information requested.

#### APRIL – MAY

##### External Reviewer Solicitation Letter Request

For “Mandatory Consideration, Tenure Track” and “Promotion, Tenured” cases only

- Handled by the Department Review Committee or the Department Head per departmental faculty evaluation guidelines for “Mandatory Consideration, Tenure Track” and “Promotion, Tenured” cases
- From the two lists, a group of at least 7 are to be selected and contacted by the Department Head or Department Review Committee Chair
- Must use the University Standard External Review Template (refer to Appendix I in the [University Promotion and Tenure Guidelines](#)) to solicit external evaluations. Send via email and in the subject line state "Candidate Name Tenure and Promotion External Review Official Request".
- Alternatively, letters from external reviewers can be solicited via Interfolio – preferred.  
<https://dof.tamu.edu/dof/media/DOF-Media/Documents/Interfolio/Interfolio%20RPT/P-T-Interfolio-How-to-Request-an-External-Evaluation-through-an-RPT-Case.pdf>

#### MAY – AUGUST

##### External Evaluations

For “Mandatory Consideration, Tenure Track” and “Promotion, Tenured” cases only

- Compile as received for placement in the dossier if Interfolio is not used to request the reviews\*
- Must include a minimum of 5 arm's length letters, although 7 is preferred with at least 4 letters from individuals in peer or aspiring programs/universities
- A minimum of 3 letters from the department's suggested list must be included

\*If Interfolio is used to request external reviewer letters, the system will automatically send out periodic reminders as the due date for receipt of the letters approaches. When the external reviewer submits their letter, it automatically uploads directly into the Candidate’s case.

## AUGUST – SEPTEMBER 15TH

### Mandatory Consideration, Tenure Track; Promotion, Tenured; Mid-Term Review, Tenure Track; and Post Tenure Review

The Department Review Committee writes well-substantiated analyses of the scope (quality, productivity overtime) and IMPACT of Candidate's performance in each of the three areas of responsibility.

- For faculty with joint appointments, committees should have clear understanding of the expectations for each department in the areas of teaching; research and/or other scholarly or creative activities and service.
- Interdisciplinary activities should be evaluated and valued the same as those that are discipline specific.
- IMPACT of the Candidate's performance on student success, through teaching, research and service activities should be addressed and valued, when appropriate.

These reports document the analysis / assessment of each area of responsibility assigned to the Candidate. They should not repeat information that can be found elsewhere in the dossier. They may refer to the external reviewer letters and other materials without directly quoting them.

Authorship of each report should be made clear by listing the names of the individual or individuals who wrote each report. These reports should be edited to ensure they accurately reflect the views of the Department Review Committee. To indicate this occurred, add a typed statement at the end of each report such as, *"The opinions and conclusions stated in this report regarding the candidate accurately reflect the views of the Department Review Committee"*.

For guidance on writing the various Department Review Committee's reports, visit <https://facultyaffairs.tamu.edu/Career/Promotion-and-Tenure> and scroll down to *"Resources for P&T Committee Members"*.

#### Teaching Report

- To include evaluation of course materials; Synthetic analysis of student evaluations of teaching; Evaluation of other valuable teaching contributions.

#### Research and/or Other Scholarly or Creative Activities Report

- Place the Candidate's impact of research or other scholarship contributions in the context of the specific departmental mission, goals, expectations, and criteria.

#### Service Report

- Explain the Candidate involvement, contributions, quality, and impact of their service activities to the institution and externally.

#### Department Review Committee Discussion Report & Recommendation

- Convey the essence of the Department Review Committee's discussion and vote regarding the Candidate's performance and impact of their work as it relates to their suitability for eventual promotion and/or tenure or post tenure productivity.
- Summarize the most relevant issues brought up during the discussion and which will explain the outcome of the vote. A record of votes alone does not document the important issues in the deliberations.
- Address any negative comments made by external reviewers.
- Include voting table; a mixed vote requires further explanation of both the candidate's demonstrated abilities and the committee's concerns.
- A table listing the committee members, their titles, and confirmation that they agree with the content of the letter (must be all those who voted) must be placed immediately after the Discussion report.
- All committee members indicate agreement that the document reflects the discussion and voting outcome with their signature. (An email agreeing to the content of the report can be appended to the end of the report in place of a signature.)

#### TAB 13: College/Department OTHER Materials and Documentation

- If applicable, upload any other materials and documentation deemed pertinent to the case that the department review committee considered (ie: annual evaluations and mid-term review report).

### AUGUST – SEPTEMBER 15TH

#### Promotion, Academic Professional Track and Mid-Term Review, Academic Professional Track\*

The Department Review Committee writes well-substantiated analyses of the scope (quality, productivity overtime) and IMPACT of Candidate's performance in each of the two areas of responsibility.

- For faculty with joint appointments, committees should have clear understanding of the expectations for each department in the areas of teaching and service.
- Interdisciplinary activities should be evaluated and valued the same as those that are discipline specific.
- IMPACT of the Candidate's performance on student success, through teaching and service activities should be addressed and valued, when appropriate.

These reports document the analysis / assessment of each area of responsibility assigned to the Candidate. They should not repeat information that can be found elsewhere in the dossier. They may refer to other materials without directly quoting them.

Authorship of each report should be made clear by listing the names of the individual or individuals who wrote each report. These reports should be edited to ensure they accurately reflect the views of the Department Review Committee. To indicate this occurred, add a typed statement at the end of each report such as, *"The opinions and conclusions stated in this report regarding the candidate accurately reflect the views of the Department Review Committee"*.

For guidance on writing the various Department Review Committee's reports, visit <https://facultyaffairs.tamu.edu/Career/Promotion-and-Tenure> and scroll down to *"Resources for P&T Committee Members"*.

- Teaching Report**
  - Must include evaluation of course materials, a synthetic analysis of student evaluations of teaching and evaluation of other valuable teaching contributions.
- Service Report**
  - Explain the Candidate involvement, contributions, quality, and impact of their service activities to the institution and externally.
- Department Review Committee Discussion Report & Recommendation**
  - Convey the essence of the Department Review Committee's discussion and vote regarding the Candidate's performance and impact of their work as it relates to their suitability for eventual promotion.
  - Include voting table; a mixed vote requires further explanation of both the candidate's demonstrated abilities and the committee's concerns
  - A table listing the committee members, their titles, and confirmation that they agree with the content of the letter (must be all those who voted) must be placed immediately after the Discussion report.
  - All committee members indicate agreement that the document reflects the discussion and voting outcome with their signature. (*An email agreeing to the content of the report can be appended to the end of the report in place of a signature.*)
- TAB 13: College/Department OTHER Materials and Documentation**
  - If applicable, upload any other materials and documentation deemed pertinent to the case that the department review committee considered (ie: annual evaluations and mid-term review report).

\*Currently, mid-term reviews of APT faculty are strongly encouraged, but are not mandatory. A potential benefit of performing an APT mid-term review is to obtain early feedback and guidance from the various stages of review regarding the trajectory towards eventual promotion.

**Dossier Document Requirements for Department**  
**All Departmental Documentation Due September 30<sup>th</sup> Annually**

\* For “Mandatory Consideration, Tenure Track” and “Promotion, Tenured” cases only

## Addendum G

### APRIL-MAY

- External Reviewers Chart\***
  - Complete the [External Reviewers Chart](#), listed alphabetically by last name.
  - Indicate which reviewers were suggested by the candidate versus the department.
  - Submit to the CAO for approval prior to sending external reviewer letter requests.
- External Reviewers Biographies / Justifications\***
  - Provide a separate document listing the name, title, affiliation, contact information and a half page (maximum) biography highlighting specific qualifications and credentials for each of the reviewers listed on the External Reviewers Chart.
  - Information to be provided by the department head or department review committee chair; support staff may compile the information for submission.
  - Submit to the CAO along with the External Reviewers Chart discussed above.
  - Note, you may upload the external reviewers’ biographies and justifications to the Candidate’s case any time after CAO approval, but it is required to be uploaded no later than the September 30th Department Head due date.

### SEPTEMBER

- Dossier Coversheet**
  - Complete the Dossier Coversheet, including the Department Review Committee voting results and the Department Head’s recommendation; then upload to the Candidate’s case.
  - Photographs should be a vertical head or upper-body shot in which the head is 1” high.
  - Electronic (digital) photos are also required and must be a minimum of 300 dpi. Please do not copy and send website photographs or photographs embedded in a Word document.
  - Email a copy of the Dossier Coversheet Word document and the faculty member’s electronic photo file to the College Administrator.
  - A Dossier coversheet and photograph are not required for “Mid-Term, Academic Professional Track” nor “Post Tenure Review” cases.
- External Reviewers Chart\***
  - Finalize the Excel External Reviewers Chart, by specifying which letters were received.
  - Upload the final External Reviewer Chart to the Candidate case (removing any previous versions that may be uploaded).
- Department External Reviewers Checklist\***
  - Upload to Candidate’s case.
- External Reviewer Solicitation Letter Request\***
  - Upload a sample of the external reviewer solicitation letter to the Candidate’s case.
- External Reviewers Biographies / Justifications\***
  - Upload to the Candidate’s case.
- External Evaluations\***
  - If Interfolio was not used to solicit external reviewer letters, be sure all letters received are uploaded to the Candidate’s case in the same order in which they appear on the External Reviewers Chart.
- Faculty Tenure Table**
  - Upload the [Faculty Tenure Table](#) in Word for “Mandatory Consideration, Tenure Track” cases only.

### SEPTEMBER 30TH

- Department Head**
  - Recommendation letter uploaded to the Candidate’s case.
  - Send case to College Administrator step in Interfolio.

## Dossier Document Requirements for College Level

### Addendum H

#### SEPTEMBER 30TH

- College Administrator**
  - Checks Candidate case for all documents required, follows up with Department Head as needed.
  - Sends Candidate case to the College Review Committee.

#### OCTOBER 31ST

- College Review Committee**
  - Uploads the College Committee Report and Recommendation to the Candidate's case.
  - If applicable, upload any other materials and documentation deemed pertinent to the case that the college review committee considered that was not already uploaded by the department review committee under TAB 13: College/Department OTHER Materials and Documentation.
  - Send case to the college "Dean" (CAO) step in Interfolio no later than October 31st.

#### NOVEMBER 30TH

- Chief Academic Officer**
  - Recommendation and summary letter uploaded to the Candidate's case for all promotion and/or tenure cases.
  - May or may not provide a recommendation letter, at Chief Academic Officer's discretion for
    - Mid Term Review, Tenure Track
    - Mid Term Review, Academic Professional Track
    - Post Tenure Review

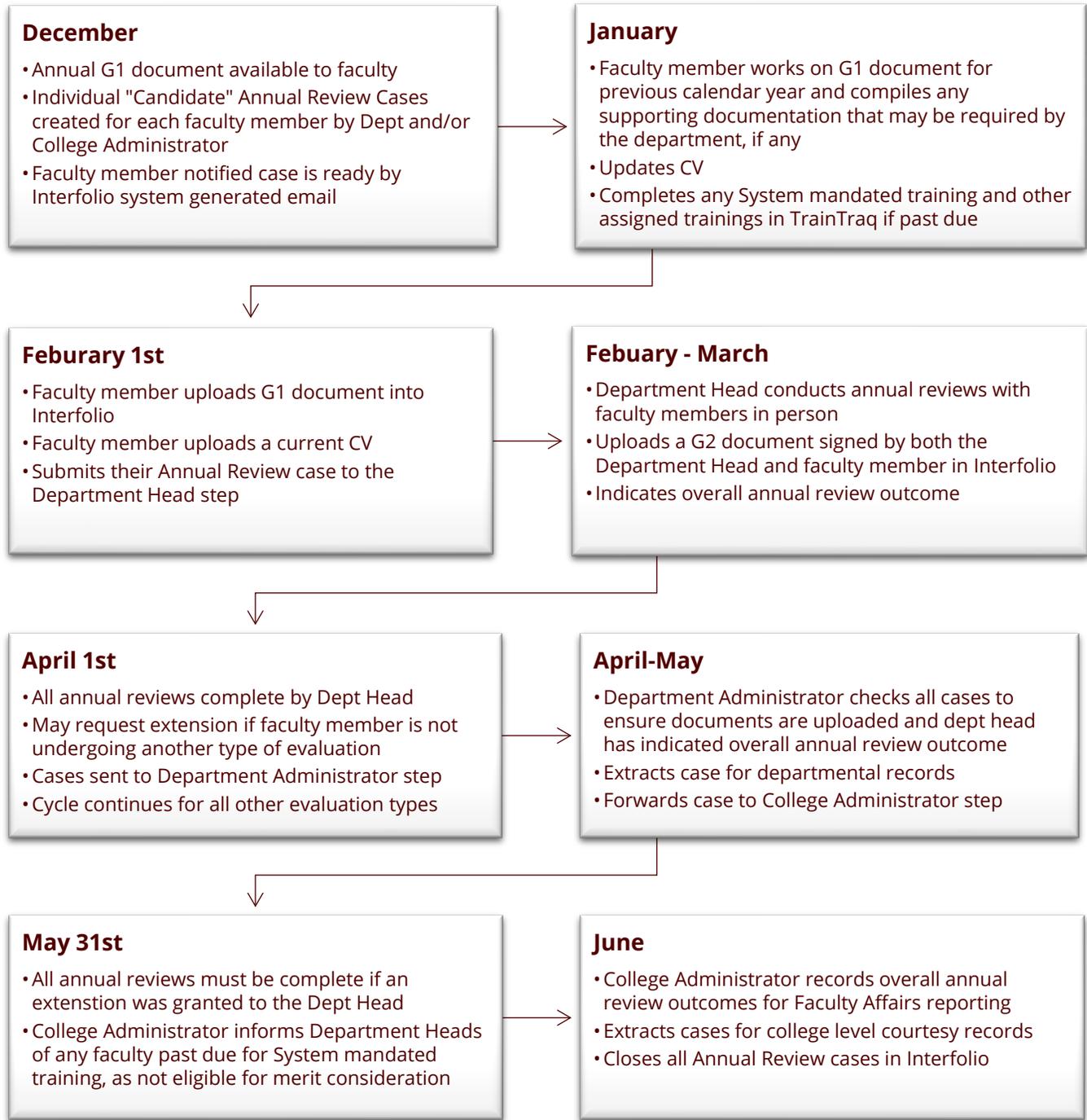
#### DECEMBER – *deadline set annually by Faculty Affairs*

- Dossier Coversheet**
  - College Administrator to finalize the [Dossier Coversheet](#) with both College Review Committee and Chief Academic Officer voting outcomes for all promotion and/or tenure Candidate cases.
- Office of Faculty Affairs**
  - College Administrator or Chief Academic Officer to submit all promotion and/or tenure cases in Interfolio to "Faculty Affairs Staff Review" level in Interfolio. This ends our involvement with the cases in Interfolio. The Office of Faculty Affairs will handle all subsequent steps including closing the promotion and/or tenure Candidate cases.
- Records Retention**
  - College Administrator to close all mid-term and post tenure review cases in Interfolio.
  - College Administrator to extract all Candidate case dossiers from Interfolio and retain courtesy record at the college level. **Note, Departments should also perform this last step after cases are sent to the Office of Faculty Affairs.**

## Addendum I

### Interfolio Annual Review Steps

*Note: College and Department Administrators have full access to the case no matter which step the case is at.*



## Addendum J

### Interfolio Cycle Evaluation Steps

*Note: College and Department Administrators have full access to the case no matter which step the case is at.*

