# Document Management Online:
Preparing Your Tenure and Promotion Portfolio

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CELT Tenure and Promotion Sessions | 24 May 2023

THOMPSON RIVERS UNIVERSITY

Thompson Rivers University campuses are on the traditional lands of the Tk'emlúps te Secwépemc (Kamloops campus) and the T'exelc (Williams Lake campus) within Secwépemc'ulucw, the traditional and unceded territory of the Secwépemc. Our region also extends into the territories of the St'át'imc, Nlaka'pamux, Nuxalk, Tŝilhqot'in, Dakelh, and Syilx peoples
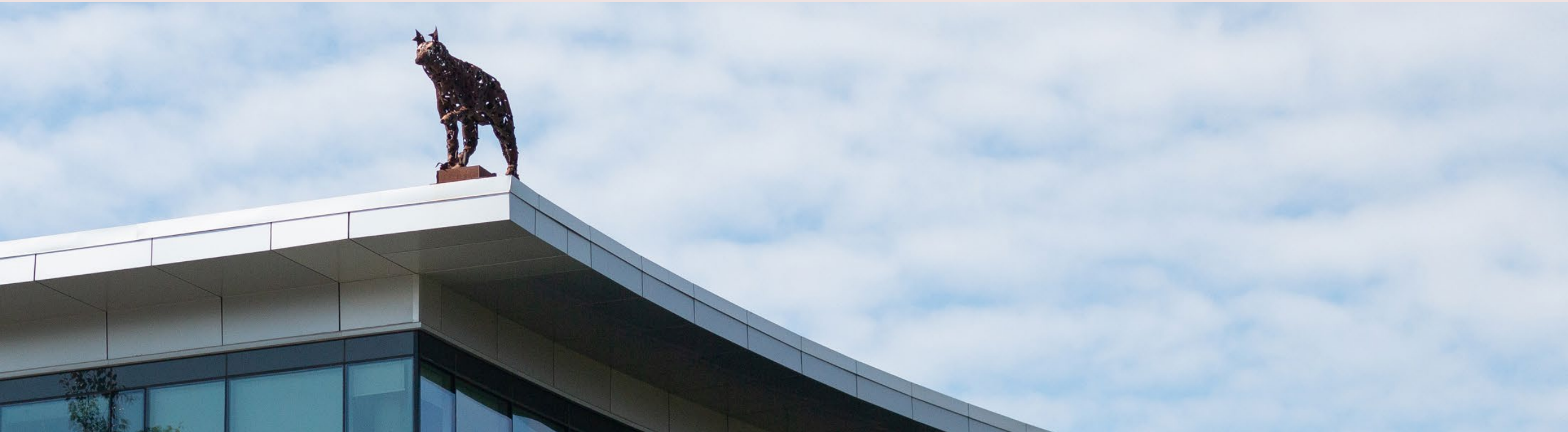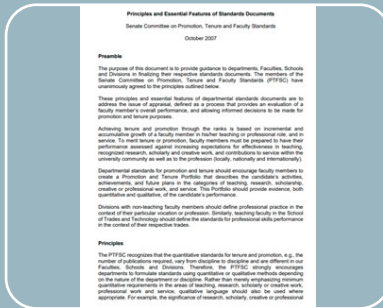
Agenda

Grounding Documents

Audience

Gather Evidence

Organizing Evidence

Formatting and Technical Tips

Read Grounding Documents

Principles and Essential Features of Standards Documents (October 2007 with Nov 2020 update)
https://www.tru.ca/__shared/assets/Principles_and_Essential_Features_of_Standards_Documents23557.pdf

Your Departmental/Faculty Standards

https://www.tru.ca/senate/committees/stpc/documents.html
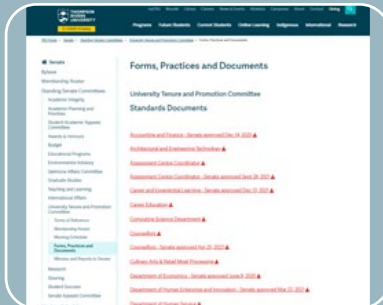
TRU / TRUFA Collective Agreement
http://trufa.ca/ca/

Relevant Collective Agreement Articles

Article 5: Appointment of Faculty Members

- 5.1.1 – Ranks - Tripartite appointments
- 5.1.2 – Ranks - Bipartite appointments
- 5.2.1 – Tenure-Track Appointment
- 5.2.3 – Tenured Appointment

Article 6: Tenure and Promotion of Faculty Members

- All articles, especially **Article 6, Appendix 1**

Article 10: Workload

- 10.2 – Academic Duties and Responsibilities

Tenure and Promotion Workshop
Information Session Booklet:
https://www.tru.ca/senate/committees/stpc.html

THOMPSON RIVERS UNIVERSITY

TENURE AND PROMOTION INFORMATION SESSION
May 24, 2023

Put your best foot forward

Committees and reviewers can ONLY look at what is in your portfolio

Tie your evidence to your departmental/faculty standards. Be specific enough for the audiences to see the links

Consider Audience

Division, Faculty or School Tenure and Promotion Committee (DFSTPC)

- Dean (or designate)
- Colleagues in your discipline
- Other faculty who are not from your department(s)

Three external reviewers

University Tenure and Promotion Committee

- Provost (or designate)
- VP Research
- Two Deans (appointed by Provost)
- Your Dean
- Faculty representative from every Division, Faculty, and School
- TRUFA Observer (non-voting)

Gather Evidence

Keep Track of What You Do

| What | When | Where | Its Importance | Your Contribution |
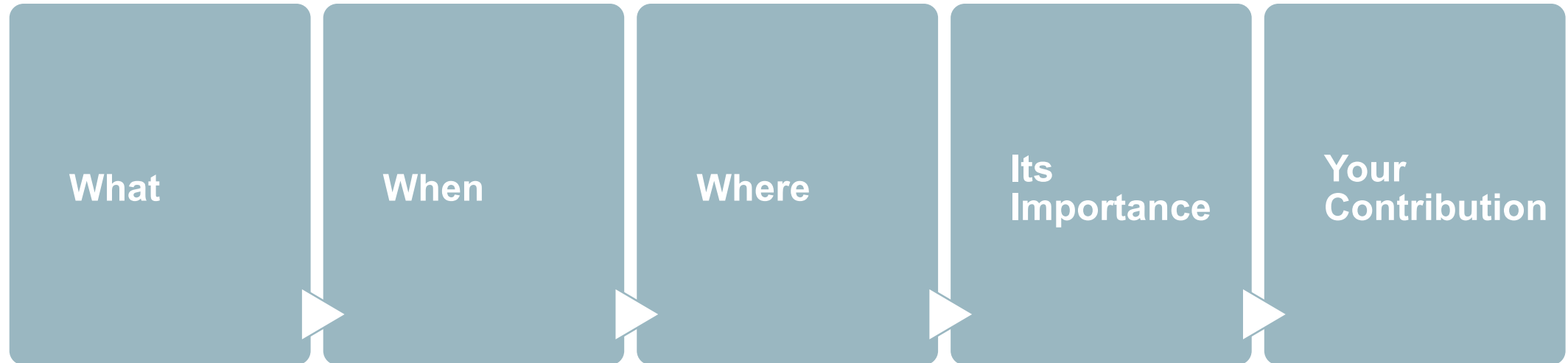
Create an Evidence Table with Your Departmental Standards

Criteria	Summary of Evidence
1. Demonstrates effective instruction in the use of information resources through reference services (face-to-face or virtual), including the ability to guide students and faculty in the development of skills in research methodology	
2. Uses appropriate instructional materials with respect to volume, level, and currency.	
3. Provides evidence of organization, presentation, and evaluation of library instructional sessions as evidenced in a teaching portfolio	

Create Folders

A_Application Letter
B_Curriculum Vitae
C_Annual Professional Activity Reports *(optional)*
D_Teaching/Professional Role Dossier
E_Service Dossier
F_Scholarly/Research and/or Creative Dossier
G_Other Documentation

More about Folders

A_Application Letter	• Separate application letter(s) for tenure and/or promotion to the Dean/Director and the DFSTPC chair • Separate letters for tenure and promotion • Note what percentages you want to be evaluated on • Recommended: portfolio structure – how it is laid out, and how to approach it
B_Curriculum Vitae	• Ensure your CV is current and comprehensive • Use proper citation format for scholarly and creative work
C_Annual Professional Activity Reports *(optional)*	• No longer required • **BUT:** including them and your dean/chair responses is a good way to show your growth (especially for tenure)

More about Folders

D_Teaching/Professional Dossier	• Check **Article 6, Appendix 1** for mandatory and optional items to include – e.g., course outlines, teaching evaluations, philosophy statement, etc. • Documentation regarding professional accomplishments, etc.
E_Service Dossier	• Document your internal and external service contributions, including your role/contribution, time commitment, etc.
F_Scholarly/Research and/or Creative Dossier	• Provide samples of scholarly work, publications, exhibitions, etc. • Include the dissemination status – i.e., published/accepted/submitted • Grants and awards received, etc.
G_Other Documentation	• Provide any additional documented evidence that you consider relevant to meeting your discipline specific tenure or promotion criteria

Teaching /Professional Role Dossier

- Start with edited evidence table at the top of the folder – e.g., 1_Summary of Teaching Role

  - How do you meet each standard, the evidence you are providing, and where it is located in your dossier

- Review **Article 6, Appendix 1**

  - Make sure you have all the mandatory items required
  - Select which optional items apply to you
  - Minimum three (3) course evaluations from the last 40 months (1 May 2020- 31 August 2023)
  - Minimum three (3) peer evaluations (signed and dated) from the last 40 months (May 1, 2020 – August 31, 2023)

Sample Evidence Table

Standards	Brief Summary	Documentation
Reference Services 1. Demonstrates effective instruction in the use of information resources through reference services (face-to-face or virtual), including the ability to guide students and faculty in the development of skills in research methodology.	Reference Services involves facilitating access to information in response to an individual's information need. In an academic library, it may include finding answers to specific questions, helping to develop research strategies, providing instruction in how to use library resources and tools, and creating instructional aids such as LibGuides. It is no longer tied to the traditional reference desk; librarians try to offer point-of-need service to users where they are and when they need it. My reference-related activities have included the following: Face-to-Face Reference and AskAway Liaison-Based Research Consultations Open Learning Reference LibGuides **1. Face-to-Face Reference and AskAway** I have provided face-to-face "in person" reference assistance during regularly scheduled shifts throughout my career at TRU (excluding a service model change from Summer 2019 to Summer 2021). I have also done chat virtual reference assistance via the shared provincial AskAway service for almost every semester since its inception in 2006. **2. Liaison-Based Research Consultations** Research consultations are one-hour meetings between a librarian and a student, staff, or faculty member that provide in-depth, individualized help choosing research tools, using advanced search techniques, developing search strategies, and finding specialized materials. As the face-to-face reference model has changed, librarians now do booked consultations in lieu of scheduled reference desk shifts. Consultations are held on request in my office or via phone/videoconference (i.e., MS Teams, BlueJeans, or Big Blue Button), depending on the person's preferred mode of meeting.	See *D_Professional Dossier > 6_Liaison Services > 6.1_Reference and Research Consultations > 6.1.a Overview* : • Section I. Face-to-Face Reference and AskAway • Section II. Liaison-Based Research Consultations *Supporting Documents:* • 6.1.b LibCal research consultation statistics-2017-22 • 6.1.c LibWizard consultation evaluation summary report-2016-22

	librarian for Sociology/Anthropology to collaborate with me on completing the program and course consultation form to mentor her in undertaking detailed course and program analyses.	
Professional Development 11. Provides evidence of professional development activities to maintain currency of professional knowledge.	To ensure the growth and currency of my professional knowledge, I regularly read literature in my field and attend multiple conferences and webinars every year. I complete online courses as needed. I also actively disseminate my knowledge by presenting at conferences and webinars.	See *C_Annual Professional Activity Reports* for complete list of conferences, webinars, and courses.
Recognition for and Dissemination of Professional Knowledge 17. Is recognized for professional/pedagogical knowledge at a regional, provincial, and national level. 18. Accepts opportunities to share instructional/learning design and professional/pedagogical knowledge and/or experience at regional, provincial, and national levels. 21. Is recognized for professional/pedagogical knowledge at a national and	I have been asked to share my professional knowledge in multiple ways. I was a member of the COPPUL Resource Sharing Working Group in 2019, which I was asked to join due to my previous resource sharing activities. I later became one of the inaugural co-chairs of the new COPPUL Resource Sharing Community. I was given the COPPUL 2022 Outstanding Contribution Award for my services to resource sharing. Most of the external recognition for and dissemination of my professional knowledge, however, relates to open education (OE). I have been invited to be a peer reviewer for scholarly journals on OE-related topics. Multiple people have approached me over the past six years from across Canada and the US, as well as individuals in Germany and Australia to ask me questions about OE-related topics. I have presented at many conferences, webinars, and workshops at the local, provincial, national, and international levels about OE. I have been interviewed by a couple of national publications for articles and was a podcast guest about OE. My 2017 journal article has been cited 50 times, with an h-index of 2, and was recognized in 2018 by the Association of College and Research	See *D_Professional Dossier > 3_Open Education > 3.a Overview* : • Section XI. Beyond TRU *Supporting Documents:* • 3.i BCcampus article • 3.j Kamloops Now article • 3.k Education News Canada article • 3.m ACRL DLS blog article See *D_Professional Dossier > 6_Liaison Services > 6.4_LibGuides > 6.4.a_Overview* *Supporting Documents:* • 6.4.e Sample request to use LibGuide See *D_Professional Dossier > 5_Resource Sharing > 5.a Overview* : • Section V. Beyond TRU See *E_Service Dossier > E.2 Description of Service Activities* for more information about the COPPUL award, the COPPUL Resource Sharing Working Group, and COPPUL Resource Sharing Community.

Service Dossier

- Start with edited evidence table at the top of the folder – e.g., 1_Summary of Service
  - How do you meet each standard, the evidence you are providing, and where to find it in your dossier
- What was the service commitment?
- Internal vs External
  - Internal – department, faculty/school/division, or university level
  - External – regional, provincial, national, international
- What was your role/contribution?
- What was the time commitment?

Sample Service Folder File Structure

E.1 Overview of Service

E.2 Description of Service Activities

E.3 COPPUL 2022 award article

E.4 COPPUL Policies and Practices for Resource Sharing

E.5 COPPUL RSC thank you email

E.6 OpenEd20 recognition letter

E.7 OpenEd21 recognition letter

E.8 UN SDG Preparing for your presentation infographic

E.9 UN SDG Tips for presenting infographic

Description of Service Activities

Service has always been an aspect of my job that I really enjoy, so I tend to do a lot of it and to be involved in different areas that interest me and/or that are directly related to my professional role. One of the challenges of instructional support faculty is that our service and professional activities often overlap to the extent that they are sometimes difficult to separate. This document provides descriptions of a selection of my service commitments between September 2016 and August 2022. It describes my service roles for the department, division, and university, as well as for the profession at the provincial, national, and international levels. It also provides an estimate of time commitments, as appropriate or available.

Note: I served as Department Chair from 2010-2016, which was prior to the period of this portfolio. Over the past six years, I have actively chosen not to put my name forward as chair for any departmental or divisional committees because I have been a strong voice in the evolution of the TRU Library and the Librarians' Department, and it is important to bring other voices into the conversation and to provide my colleagues with the same opportunities that I have had. We have several librarians who are taking a strong interest in the department and its activities, and I recognized that it was time to step aside and let them take the lead. I have not shirked my departmental or divisional service participation, but I tend to let others step forward first, and only become involved if others consider my voice and experience to be a valued addition.

I. Librarians' Department

A. Appointments Committee, *Member* (2006-present)

This committee involves shortlisting and interviewing candidates for each librarian position. As a committee member, I have contributed to the creation of job postings, participated in the development of interview questions and presentation topics, shortlisted, interviewed candidates, conducted reference checks, and edited recommendation letters. Each competition takes approximately 20 hours to complete. I also provided feedback on the creation of the department's rubric that we use to evaluate candidates. Since September 2016, I have participated in the appointments process for one sessional, four limited term, and four tenure-track librarians.

Polytechnic University, Douglas College, and Selkirk College) to discuss opportunities/needs for zero textbook cost programs in Business. There were two-hour long meetings every quarter until the project wrapped up in March 2021.

4. BC Studies Conference, *Co-Chair* (July 2018-May 2019)

Due to my role as Philosophy History Politics subject librarian, Tina Block (Associate Professor, History) asked me to co-chair the bi-annual BC Studies Conference with her, which was held at TRU in May 2019. This multidisciplinary conference focuses on all areas of research on British Columbia and from all fields, including the arts and humanities, law, education, social work, and the natural and social sciences. While it is a multidisciplinary event that attracts scholars from around the world, the bulk of the sessions and participants tend to be historians and political scientists. I set up and administered a Digital Commons site to manage the conference and a Brown Paper Tickets site to handle registrations. I also worked with Tina on all the other conference administration tasks (i.e., establishing a process to review conference proposals, creating a schedule, selecting a keynote speaker, booking rooms, organizing food, making nametags, handling conference registration, etc.).

5. Sharing about the TRU Chairs Group

While I have not been part of the TRU Chairs Group since my term as Department Chair ended in June 2016, I have had some contact from other institutions since that time to share my expertise about this community of practice. In December 2016, I was invited to present at the University of the Fraser Valley's Department Heads Retreat in Abbotsford, BC about the TRU Chairs Group. In my presentation, I talked about how we developed and structured the group and shared the benefits and challenges that we faced. In June 2021, Shawn Read (Chair of TRU Chairs Group) and I met with a Dean Pro Tem from Kwantlen Polytechnic University about the development, structure, purpose, and processes of TRU's Chairs Group because they are interested in forming a similar group at KPU. I was asked to participate in the meeting since I was co-chair of TRU's Chairs Group (2012-2016) and had played a large role in its re-envisioning in the early 2010s, including co-presenting about it at the 2016 Academic Chairpersons Conference in Charleston, SC.

B. National

1. COPPUL Outstanding Contribution Award for 2022 *(March 2022)*

The Council of Prairie and Pacific University Libraries (COPPUL) gave me this award for my work in resource sharing over the past 20 years, particularly for my leadership as Chair of the COPPUL ILL Working Group during the 2000s and as the inaugural Co-Chair of the COPPUL Resource Sharing Community in 2020-2021. COPPUL is a consortium of all public university libraries in British Columbia, Alberta, Saskatchewan, and Manitoba.

> For more information, see the following supporting documentation in this folder:
> * E.3 COPPUL 2022 award article

2. COPPUL Resource Sharing Working Group (RSWG), *Member* (January-September 2019)

I was asked to join the COPPUL Resource Sharing Working Group, partially due to my previous roles in the mid-2000s as chair of the COPPUL ILL Working Group and in negotiating the original national

Scholarly/Research/Creative Dossier

- Start with edited evidence table at the top of the folder – e.g., 1_Summary of Research
  - How do you meet each standard, the evidence you are providing, and where to find it in your dossier
- Citations are enough
- Published vs. in press vs. submitted works

Formatting and Technical Tips

File Types

Create your documents in **.docx** format and **save as Adobe pdf** to retain all active hyperlinks

Do **NOT** use special bookmarks and/or links to other files – they aren't viewable
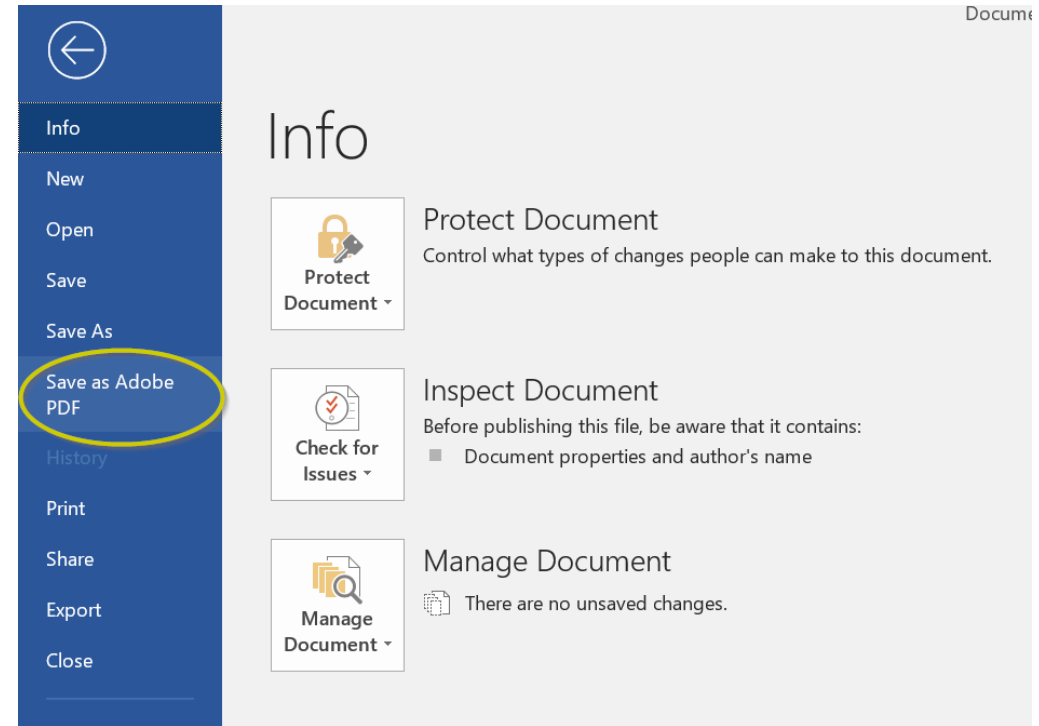
File Names

Entire decoded file path, including the file name, can't contain more than 400 characters

For example:

https://one.tru.ca/committee/tenure/portfolios/BarnettCollege/Portfolio%201%20-%Indiana%20Jones/D_Teaching%20Dossier/2_Teaching%20Philosophy.pdf

The limit applies to:

/committee/tenure/portfolios/BarnettCollege/Portfolio%201%20-%Indiana%20Jones/D_Teaching%20Dossier/2_Teaching%20Philosophy.pdf

Each segment of the path (e.g., 2_Teaching Philosophy.pdf) can't be more than 255 characters

Font Choices

Be consistent in your font choices and hierarchy of section headings

Arial 12pt font preferred for text

The quick brown fox jumped over the lazy dog. The quick brown fox jumped over the lazy dog. The quick brown fox jumped over the lazy dog. The quick brown fox jumped over the lazy dog. The quick brown fox jumped over the lazy dog. The quick brown fox jumped over the lazy dog. The quick brown fox jumped over the lazy dog. The quick brown fox jumped over the lazy dog.

Don't forget to edit and proofread…

- content – anything missing?

- clarity

- consistent tone and style

- define any important terms that might be unclear to your reader

- proper citations

- awkward phrasing

- repetitiveness

- check for typos

- spelling

- grammatical errors

- punctuation errors – especially apostrophes, colons/semi-colons, commas

- abbreviations

- capitalization

- subject-verb agreement

- verb tenses

Submit on USB flash drive

Put your portfolio on a new, empty USB stick

Keep at least one copy of your portfolio

Deadline for submission is **Friday, 1 September 2023 by 4pm**

Remember…

your portfolio must connect all the dots about who you are and how you meet the tenure and/or promotion criteria at TRU

Thank you.