Michigan State University Office of the Provost

Form on Progress and Excellence (formally Form C)– Academic Specialist

Academic Specialist Recommendation for Reappointment Award of Continuing Status and Promotion

Form on Progress and Excellence for Academic Specialists

Instructions

The recommendation for reappointment, award of continuing status and promotion to sr. specialist are based on one's contributions to their particular functional area(s). The kinds of evidence to be considered must be established at the time of appointment. This form was designed to provide the opportunity to document, provide evidence for and assess the work accomplished in the specialist's functional area(s).

On occasion, it may be difficult to identify a particular activity as belonging solely to one of the main functional areas. Candidates should list contributions according to their primary focus. They should further describe, where appropriate, any value added by such activities to other functional areas. Similarly, activities primarily and traditionally thought of as being service may also contribute to any or all the main functional areas. Chairpersons and directors are encouraged to evaluate specialists' accomplishments for those activities in preparing the summary evaluation, where appropriate, to comment on the impact on communities of the candidate's work.

- The specialist should complete the items designated for specialists based on their duties and responsibilities. Note that all sections may not apply to all specialists and further, that some sections are designated for the unit administrator(s) to fill out.
- 2. It is assumed that specialists and administrators filling out this form will expand the space for any given question as needed.
- 3. Some questions throughout the form designate a specific time-period for reporting. When no specific timeperiod is indicated, the following time periods should generally be used. Specialists may elect to exclude any terms during which they were on leave.

Type of specialist	Default time period for reporting
Fixed-term specialists who are applying for promotion from academic specialist to senior academic specialist	These specialists should report on activities from, at minimum, the prior five years. There is no upper limit to the time period for reporting.
Continuing system specialists with probationary status who are applying for reappointment to a second probationary term	These specialists should report on activities from the hire date through the time period during which Form on Progress and Excellence is being completed, which is usually, approximately 1.5 years in length. Fixed- term specialists moving to continuing status report of activities may be greater than 1.5 years in length.
Continuing system specialists with probationary status who are applying for the award of continuing status	These specialists should report on activities from their most recent submission of Form C through the time period during which this form is being completed, which is usually, approximately 3 years in length.
Continuing system specialists with continuing status who are applying for promotion from academic specialist to senior academic specialist	These specialists should report on activities from their most recent submission of Form C through the time period during which this form is being completed. This time frame is variable and there is no upper limit to the time period for reporting.

Please note that, wherever needed, additional sheets may be attached.

The review period begins with the date of appointment or most recent reappointment. The reporting period is normally the same as the review period, but this may be inappropriate in certain extraordinary situations (for instance, due to leaves, change in assignment, or an abnormally short or long review period). In such a case, the candidate, chairperson or director, and dean should agree upon an appropriate reporting period, which they should then justify and support within the body of the form.

It is recommended that the entire package, including these instructions, be provided to the candidate being considered for reappointment, award of continuing, or promotion to senior specialist action.

Cover sheet¹

-----Specialist completes the following items-----

U.S. Citizen or Permanent Resident? ²	Yes No
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¹ This cover sheet contains personal information and is not to be distributed to the review committee.

² Per the <u>Academic Specialist Handbook</u>, academic specialists need to be a U.S. citizen or have permanent residency status in order to be granted continuing status.

I. Basic information

-----Specialist completes the following items------

Name (last, first, middle) ³	
Personnel number ⁴	
Date ⁵	

Unit and major academic unit (MAU)⁶

Primary unit	
Primary MAU	
Secondary unit	
Secondary MAU	
Other unit	
Other MAU	

Current rank, function(s), status, and appointment basis⁷

Rank	 Academic specialist Senior academic specialist
Functional areas	 Advising Curriculum development Outreach Research Teaching Other
Current status	 Fixed-term In the continuing system with probationary status In the continuing system with continuing

³ Record your name as it appears on legal identification card document(s).

⁴ Your personnel number (Pernr) is the ID number listed on your earnings statements. Locate your earnings statements at Enterprise Business Systems (<u>ebs.msu.edu</u>) \rightarrow My Time & Payroll \rightarrow Earnings Statements.

⁵ Record the date that the form is submitted by the specialist for consideration.

⁶ Department/unit (unit) and college/major academic unit (MAU) names and numbers are maintained at <u>commonunitcode.msu.edu</u>. After logging in, click "Submit" without entering any search terms. Include the full name of each unit and MAU.

⁷ This should match the Specialist Position Description Form.

	status
Appointment basis	Academic year (AY)
Working Title (Assigned by Unit, i.e., Assistant Director, Director, Assistant Dean, etc.) (Optional)	

Education and training

Highest degree	
Institution	
Date	
Additional training/education/certifications	

-----Administrators complete the following items-----

Recommendations ⁸	Reco	mme	ndat	cions ⁸
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Unit Review Committee Recommendation	 Reappoint as Academic Specialist for probationary period of three years Reappoint as Academic Specialist and award continuing appointment status Reappoint as Senior Academic Specialist and award continuing appointment status Promote to Senior Academic Specialist (Continuing or Fixed Term) Promote to Senior Academic Specialist and award continuing appointment status Meappoint as Senior Academic Specialist Reappoint as Senior Academic Specialist (Continuing or Fixed Term) Promote to Senior Academic Specialist and award continuing appointment status Keep current status as Specialist (no award of promotion to senior status) Do not reappoint (for continuing system)
Unit administrator/Chairperson recommendation	 Reappoint as Academic Specialist for probationary period of three years Reappoint as Academic Specialist and award continuing appointment status Reappoint as Senior Academic Specialist and award continuing appointment status Do not reappoint (for continuing system) Promote to Senior Academic Specialist and award continuing or Fixed Term) Promote to Senior Academic Specialist and award continuing appointment status Keep current status as Specialist (no award of promotion to senior status) Do not reappoint (for continuing system)
Dean or Head of MAU Recommendation	 Reappoint as Academic Specialist for probationary period of three years Reappoint as Academic Specialist and award continuing appointment status Reappoint as Senior Academic Specialist and award continuing appointment status Promote to Senior Academic Specialist (Continuing or Fixed Term) Promote to Senior Academic Specialist and award continuing appointment status Continuing or Fixed Term) Promote to Senior Academic Specialist and award continuing appointment status Meep current status as Specialist (no award of promotion to senior status) Do not reappoint (for continuing system)

⁸ The unit administrator can be the department chairperson, school director, unit director, or anyone who is in the management position of the unit where the specialist works. Note that promotions, reappointments, and the award of continuing status are effective the first day of the month following the Provost's approval.

Administrator signatures

	Name	Signature	Date
Primary unit			
Primary MAU			
Secondary unit			
Secondary MAU			
Other unit			
Other MAU			
Provost or designee			

II. Summary Statements

------Administrators complete the following items------

1. Summary evaluation by unit administrator in alignment with the specialist's job responsibilities over the appropriate time period, citing evidence of distinction and sustained excellent performance.

Click or tap here to enter text.

2. Summary statement by Dean⁹.

Click or tap here to enter text.

3. Attach a copy of the specialist's current Specialist Position Description form.

⁹ This item applies only if this person is different from the unit administrator in item 1.

INSERT Letter from Department Head INSERT Letter from Dean INSERT Letter from Unit Review Committee INSERT Specialist Position Description

EVALUATION CRITERIA FOR EACH FUNCTIONAL AREA

	III. Advising
	Specialist completes the following items
4.	Select one of the following:
	Required. Select this option if any portion of your duties and responsibilities, according to your Specialist Position Description form, falls under advising.
	If you select this option, write the percentage of your appointment that is noted as advising on your Specialist Position Description form (e.g., 50%, 10%):
5.	 Optional. Select this option if you have taken on or been assigned advising duties in your role, but your Specialist Position Description form has not yet been updated, and you would like to be evaluated on the advising work you have done. If you select this option, you may need to work with your unit administrator to update your Specialist Position Description form and job description. Not applicable. Select this option if you do not perform any advising duties. Do not fill out the questions in this section if you select this option.
5.	Freshmen Sophomores Juniors Seniors Other (Masters, Doctoral, Professional)
6.	Number of students served on graduate/professional student guidance committees (n/a if not applicable):
	Masters Doctoral Professional
	Currently enrolled or active
	Degrees awarded (total during career)

 Provide a summary of your accomplishments and significant contributions in advising. You may reference the <u>Academic Specialist Handbook</u> section A.5.1.1 for a list of characteristic duties and responsibilities in advising. Note that these characteristic duties and responsibilities are examples of typical activities; they are not a list of required duties and responsibilities.

Click or tap here to enter text.

------Administrator completes the following item------

 Evaluation of advising by unit administrator on the above sections 4-7 filled out by the specialist and the Specialist Position Description form. Note that if the specialist selected "Optional" for item #4, this specialist's Specialist Position Description form and job description may need to be updated.

IV. Teaching¹⁰

-----Specialist completes the following items-----

9. Select one of the following:

Required. Select this option if any portion of your duties and responsibilities, according to your Specialist Position Description form, falls under teaching.

If you select this option, write the percentage of your appointment that is noted as teaching on your Specialist Position Description form (e.g., 50%, 10%):

Optional. Select this option if you have taken on or been assigned teaching duties in your role, but your Specialist Position Description form has not yet been updated, and you would like to be evaluated on the teaching work you have done. If you select this option, you may need to work with your unit administrator to update your Specialist Position Description form and job description.

Not applicable. Select this option if you do not perform any teaching duties. Do not fill out the questions in this section if you select this option.

Term and year	Course subject and number	Number of credits	Type of section (lec, rec, lab, pract, etc.)	Number of students	Type of participation (teach, teach as part of team, evaluate, demonstrate, assist instructor, etc.)

10. Record of teaching activities:

¹⁰ This section refers to credit-bearing instruction only. Non-credit-bearing instructional activities, both internal and external to MSU, are reported in section IX.

 Provide a summary of your accomplishments and significant contributions in teaching. You may reference the <u>Academic Specialist Handbook</u> section A.5.1.2 for a list of characteristic duties and responsibilities in teaching. Note that these characteristic duties and responsibilities are examples of typical activities; they are not a list of required duties and responsibilities.

Click or tap here to enter text.

-----Administrator completes the following item------

12. Evaluation of teaching by unit administrator on the above sections 9-11 filled out by the specialist and the Specialist Position Description form. Note that if the specialist selected "Optional" for item #9, this specialist's Specialist Position Description form and job description may need to be updated.

V. Curriculum development

-----Specialist completes the following items-----

13. Select one of the following:

Required. Select this option if any portion of your duties and responsibilities, according to your Specialist Position Description form, falls under curriculum development.

If you select this option, write the percentage of your appointment that is noted as curriculum development on your Specialist Position Description form (e.g., 50%, 10%):

Optional. Select this option if you have taken on or been assigned curriculum development duties in your role, but your Specialist Position Description form has not yet been updated, and you would like to be evaluated on the curriculum development work you have done. If you select this option, you may need to work with your unit administrator to update your Specialist Position Description form and job description.

Not applicable. Select this option if you do not perform any curriculum development duties. Do not fill out the questions in this section if you select this option.

14. Provide a summary of your accomplishments and significant contributions in curriculum development. You may reference the <u>Academic Specialist Handbook</u> section A.5.1.3 for a list of characteristic duties and responsibilities in advising. Note that these characteristic duties and responsibilities are examples of typical activities; they are not a list of required duties and responsibilities.

-----Administrator completes the following item-----

Evaluation of curriculum development by unit administrator on the above sections 13-14 filled out by the specialist and the Specialist Position Description form. Note that if the specialist selected "Optional" for item #13, this specialist's Specialist Position Description form and job description may need to be updated.

VI. Research

-----Specialist completes the following items-----

16. Select one of the following:

Required. Select this option if any portion of your duties and responsibilities, according to your Specialist Position Description form, falls under research.

If you select this option, write the percentage of your appointment that is noted as research on your Specialist Position Description form (e.g., 50%, 10%):

Optional. Select this option if you have taken on or been assigned research duties in your role, but your Specialist Position Description form has not yet been updated, and you would like to be evaluated on the research work you have done. If you select this option, you may need to work with your unit administrator to update your Specialist Position Description form and job description.

Not applicable. Select this option if you do not perform any research duties. Do not fill out the questions in this section if you select this option.

17. Provide a summary of your accomplishments and significant contributions in research. You may reference the <u>Academic Specialist Handbook</u> section A.5.2 for a list of characteristic duties and responsibilities in research. Note that these characteristic duties and responsibilities are examples of typical activities; they are not a list of required duties and responsibilities.

-----Administrator completes the following item-----

18. Evaluation of research by unit administrator on the above sections 16-17 filled out by the specialist and the Specialist Position Description form. Note that if the specialist selected "Optional" for item #16, this specialist's Specialist Position Description form and job description may need to be updated.

VII. Outreach

-----Specialist completes the following items-----

19. Select one of the following:

Required. Select this option if any portion of your duties and responsibilities, according to your Specialist Position Description form, falls under outreach.

If you select this option, write the percentage of your appointment that is noted as outreach on your Specialist Position Description form (e.g., 50%, 10%):

Optional. Select this option if you have taken on or been assigned outreach duties in your role, but your Specialist Position Description form has not yet been updated, and you would like to be evaluated on the outreach work you have done. If you select this option, you may need to work with your unit administrator to update your Specialist Position Description form and job description.

Not applicable. Select this option if you do not perform any outreach duties. Do not fill out the questions in this section if you select this option.

20. Provide a summary of your accomplishments and significant contributions in outreach. You may reference the <u>Academic Specialist Handbook</u> section A.5.3 for a list of characteristic duties and responsibilities in outreach. Note that these characteristic duties and responsibilities are examples of typical activities; they are not a list of required duties and responsibilities.

-----Administrator completes the following item-----

21. Evaluation of outreach by unit administrator on the above sections 19-20 filled out by the specialist and the Specialist Position Description form. Note that if the specialist selected "Optional" for item #19, this specialist's Specialist Position Description form and job description may need to be updated.

VIII. Administrative responsibilities

------Specialist completes the following items-----

22. Select one of the following¹¹:

Required. Select this option if any portion of your duties and responsibilities, according to your Specialist Position Description form, falls under administrative responsibilities.

If you select this option, write the percentage of your appointment that is noted as administrative responsibilities (other) on your Specialist Position Description form (e.g., 50%, 10%):

Not applicable. Select this option if you do not perform any administrative duties. Do not fill out the questions in this section if you select this option.

23. Provide a summary of your accomplishments and significant contributions with respect to your administrative responsibilities. You may reference the <u>Academic Specialist Handbook</u> section A.6 for a description of characteristic duties and responsibilities in administration. Note that these characteristic duties and responsibilities are examples of typical activities; they are not a list of required duties and responsibilities.

¹¹ This section is applicable only to specialists who have administrative responsibilities formally designated on their Specialist Position Description form. Specialists who have taken on or been assigned administrative responsibilities but have not had their Specialist Position Description form updated should record their relevant activities in their response to Q43 or within the appropriate section(s) numbered III through VII.

-----Administrator completes the following item-----

24. Evaluation of administrative responsibilities by unit administrator on the above sections 22-23 filled out by the specialist and the Specialist Position Description form.

CROSS-FUNCTIONAL AREA EVALUATION CRITERIA

IX. Scholarly presentations and MSU-affiliated non-credit instructional activities

-----Specialist completes the following items-----

25. Select one of the following:

Required. Select this option if any portion of your duties and responsibilities, according to your job description, requires scholarly presentations or MSU-affiliated non-credit instructional activities.

Optional. Select this option if you have taken on or been assigned duties related to giving scholarly presentations or MSU-affiliated non-credit instructional activities in your role, but your job description has not yet been updated, and you would like to be evaluated on these activities. If you select this option, you may need to work with your unit administrator to update your job description.

Not applicable. Select this option if you do not perform any duties related to giving scholarly presentations or MSU-affiliated non-credit instructional activities. Do not fill out the questions in this section if you select this option.

26. Record of scholarly presentations and MSU-sponsored non-credit instructional activities:

Year	Type of presentation (workshop, seminar, etc.)	Number of sessions per year	Target audience	Number of participants	Type of participation (instruct/present, instruct/present as part of team, evaluate, demonstrate, etc.)

27. Provide summary of your accomplishments and significant contributions with respect to scholarly presentations and MSU-affiliated non-credit instructional activities.

Click or tap here to enter text.

-----Administrator completes the following item-----

28. Evaluation of contributions to scholarly presentations or MSU-affiliated non-credit instructional activities by unit administrator. Note that if the specialist selected "Optional" for item #25, this specialist's Specialist Position Description form and job description may need to be updated.

X. Publications

------Specialist completes the following items------

29. Select one of the following:

Required. Select this option if any portion of your duties and responsibilities, according to your job description, requires publications.

Optional. Select this option if you have taken on or been assigned duties related to publications in your role, but your job description has not yet been updated, and you would like to be evaluated on these activities. If you select this option, you may need to work with your unit administrator to update your job description.

Not applicable. Select this option if you do not perform any duties related to publications. Do not fill out the questions in this section if you select this option.

30. List materials authored or co-authored in support of MSU advising, MSU credit-bearing or non-credit-bearing courses, or for use in MSU service or outreach activities. The list should be ordered chronologically by category with the most recent work listed first. Include author(s), title, date, and target audience or course.

Click or tap here to enter text.

31. List research publications, papers, and other creative works under headings of (1) Books; (2) Book chapters; (3) Bulletins or monographs; (4) Articles (for multi-authored articles, indicate how the primary or lead author can be identified); (5) Reviews; (6) Papers read/published in conference proceedings; (7) Invited papers; (8) Artistic endeavors (exhibits, showings, scores, performances, recordings, etc.); (9) Other scholarly and creative works and activities (video production, etc.). The list should be ordered chronologically by category with the most recent work listed first. Asterisk (*) monographs and articles which received peer review.

-----Administrator completes the following item-----

32. Evaluation of contributions to publications by unit administrator. Note that if the specialist selected "Optional" for item #29, this specialist's Specialist Position Description form and job description may need to be updated.

XI. Grants

------Specialist completes the following items-----

33. Select one of the following:

Required. Select this option if any portion of your duties and responsibilities, according to your job description, requires grants.

Optional. Select this option if you have taken on or been assigned duties related to grants in your role, but your job description has not yet been updated, and you would like to be evaluated on these activities. If you select this option, you may need to work with your unit administrator to update your job description.

Not applicable. Select this option if you do not perform any duties related to grants. Do not fill out the questions in this section if you select this option.

34. Record of grant and/or contract proposals authored/co-authored within the last six years. The candidate may elect to extend the six-year period by a length of time equal to the length of any leaves taken during the past six years and make a notation to this effect.

Title	Name of granting or contracting agency	Date submitted	Amount funded ¹²	Principal/co- investigators

¹² Or write "pending" or "rejected" as appropriate.

-----Administrator completes the following item-----

35. Evaluation of contributions to grants by unit administrator. Note that if the specialist selected "Optional" for item #33, this specialist's Specialist Position Description form and job description may need to be updated.

XII. Committee service

-----Specialist completes the following items------

36. Select one of the following:

Required. Select this option if any portion of your duties and responsibilities, according to your job description, requires committee service.

Optional. Select this option if you have taken on or been assigned duties related to committee service in your role, but your job description has not yet been updated, and you would like to be evaluated on these activities. If you select this option, you may need to work with your unit administrator to update your job description.

Not applicable. Select this option if you do not perform any duties related to committee service. Do not fill out the questions in this section if you select this option.

37. Indicate significant committee service and contributions under the following headings: 1) department/unit, 2) college/MAU, 3) university and 4) national/international.

Click or tap here to enter text.

38. Indicate participation in professional associations, organizations, committees, and societies.

-----Administrator completes the following item------

39. Evaluation of contributions to committee service by unit administrator. Note that if the specialist selected "Optional" for item #36, this specialist's Specialist Position Description form and job description may need to be updated.

XIII. DEI¹³

Fill out the remaining questions (Q40) if you have activity in these areas and would like them to be included in your evaluation. (This section is not a required area currently)

40. Provide a summary of your efforts with respect to diversity, equity, and inclusion.

Click or tap here to enter text.

-----Administrator completes the following item------

41. Evaluation of contributions of the specialist (if any) as described in Q40 by unit administrator.

¹³ This section will continue to be developed with the larger discussion and initiatives at the university level. It is expected to be a required component of the review process beginning AY 2022-2023.

XIV. Additional Significant Contributions

-----Specialist completes the following items------

Fill out the remaining questions (Q42-44) if you have activity in these areas and would like them to be included in your evaluation.

42. List other professional development activities including attendance at conferences, workshops, and seminars; enrollment in degree-granting programs; etc.

Click or tap here to enter text.

43. List awards and honors received.

Click or tap here to enter text.

44. Summarize any other significant contributions which have not been covered elsewhere.

-----Administrator completes the following item-----

45. Evaluation of contributions of the specialist (if any) as described in Q42-44 by unit administrator.

INSERT **Reflective Essay** (Five page limit, firm) INSERT CV (No required format, AAMC format recommended) INSERT External/Internal Reviews (as required)

INSERT Annual Reviews from Each Year of the Review Period (in order from most recent, must include page with explanation for any missing years)

INSERT Annual Review 2022 INSERT Annual Review 2021 INSERT Annual Review 2020 INSERT COVID-19 Impact Statement (optional)

Academic Portfolio Divider Template

Continuing Status and/or Senior Academic Specialist – Academic Specialist System

This template was last updated on 5/17/2023.

Instructions

Use this template to create the dividers for your Academic Portfolio.

- 1. Remove sections for functional areas that you will not address. Retain sections for all areas in which you have allocated effort.
- 2. Add the specific criteria for promotion in your position for each area, as provided by your supervisor/appointing unit.
- 3. In a separate folder location¹, assemble the artifacts that you will use as evidence that each criterion is met. Organize subfolders according to the areas of review and criteria. (Hint: open the Navigation Pane in this document for a quick list of areas of review and criteria.)
 - a. Save each artifact as a .pdf.
 - b. Use Adobe Acrobat Reader to add comments and annotations to artifacts to direct the reviewer's attention. Make sure the title of the artifact is at the top of the first page of the artifact.
- 4. On each divider page in this document, write 1-2 brief paragraphs summarizing your case that the criterion is met.
- 5. Below the paragraphs, list the titles of the artifacts that support your case in the order they should be presented.
- 6. Submit this file and the folder of artifacts to your departmental RPT staff person with your other dossier components.

MAXIMUM SIZE OF COMPLETED DOSSIER (ACADEMIC PORTFOLIO AND OTHER REQUIRED DOCUMENTS): 500 PAGES

¹ On OneDrive, Google Drive, your hard drive, etc.

Advising

A.1 Title Text of criterion Summary of case List of artifacts A.2 Title Text of criterion. Summary of case

Teaching

T.1 Title Text of criterion. Summary of case List of artifacts T.2 Title Text of criterion. Summary of case

Curriculum Development

CD.1 Title Text of criterion. Summary of case

CD.2 Title Text of criterion. Summary of case

Research

R.1 Title Text of criterion. Summary of case List of artifacts R.2 Title Text of criterion. Summary of case

Outreach/Public Service

O.1 Title Text of criterion. Summary of case List of artifacts O.2 Title Text of criterion. Summary of case

Administrative Service

AS.1 Title Text of criterion. Summary of case List of artifacts AS.2 Title Text of criterion. Summary of case

Committee Service

CS.1 Title Text of criterion. Summary of case List of artifacts CS.2 Title Text of criterion. Summary of case List of artifacts

Other

Use this section for criteria related to Clinical Service (if applicable) or other areas that are not included in the above categories.

O.1 Title Text of criterion.

Summary of case

O.2 Title Text of criterion. Summary of case

INSERT Additional Reporting

(Bookmark documents for Additional Significant Contributions)