Annual Guidelines for Extension Faculty Promotion: 2019–2020

EXTENSION FACULTY POLICY AND STANDARDS COMMITTEE (NTT) APPROVED 2019
# Table of Contents

Annual Guidelines for Extension Faculty Promotion: 2019–2020

- Content Outline for Extension Promotion Dossier ................................................................. 3
- Dossier Standards ...................................................................................................................... 5
- Dossier Responsibilities ............................................................................................................. 7
- NTT Process Timeline ............................................................................................................ 9
- External Reviews ..................................................................................................................... 11
- Colleague/Peer Evaluation ...................................................................................................... 12
- Promotion Workshops ............................................................................................................. 13

## Appendices

Appendix A.1 — Criteria, Evidence, Documentation and Content Guidance for Promotion to Associate Extension Professional ......................................................................................... 14

Appendix A.2 — Criteria, Evidence, Documentation and Content Guidance for Promotion to Extension Professional .................................................................................................................. 17

Appendix B — Ranked Non-Tenure Track Faculty, University of Missouri Extension Promotion Recommendation .......................................................................................................................... 20

Appendix C — MU Promotion for Ranked Non-Tenure Track Faculty, University of Missouri Extension — History and Recommendation Summary ................................................................. 21

Appendix D — Definition of Terms .......................................................................................... 22

Appendix E — Procedure for Selection of Outside Reviewers, University of Missouri Extension Non-Tenure Track Faculty Promotions, 2019-2020 ........................................................................... 24

Appendix F — Suggested Wording of Initial Email Requesting a Review of Candidate’s Dossier by External Peers and Stakeholder/Partner/Collaborator ................................................................. 27

Appendix G — Follow-up Letter for Requesting Review of Candidate’s Dossier by External Peers and Partner/Collaborator/Stakeholder Reviewers ............................................................................. 28
Annual Guidelines for Extension Faculty Promotion: 2019–2020

Non-Tenure Track (NTT) promotion requires going beyond satisfactory performance; it is not a reward for longevity. The promotion dossier serves as the candidate’s application for promotion. It documents how a candidate has gone beyond satisfactory performance by providing evidence of what they planned to do as established by their plans of work, what they really did, why they did it, how they did it and what the results were. Results include outputs, outcomes and impacts as defined in Appendix D, Definition of Terms.

The dossier is prepared in accordance with the Vice Chancellor for Extension and Engagement’s Annual Guidelines for Extension Faculty Evaluation and Promotion, and the Provost’s call for promotion applications. These Annual Guidelines describe the required components of the dossier and provide guidance on the evidence, documentation, content and technical parameters for submission.

The Extension Faculty Policy and Standards Committee reviews the entire dossier and forwards it with a promotion recommendation to the Vice Chancellor of Extension and Engagement. All committee deliberations remain confidential. Forward any questions about a promotion recommendation to the committee chair.
The Content Outline for
Extension Promotion Dossier

The dossier is submitted both electronically and in paper. Submit the paper dossier in a blue pressboard folder with the specified tabs. The dossier’s structure and contents are:

Inside Front Cover
- Recommendation Signature Page and Record of Formal Votes (before and after any appeals) (Appendix B)
- History and Recommendation Summary Form (Appendix C)

(Tab I) Appointment Folder
- Initial letter of appointment
- Job descriptions for the entire evaluation period
- Plans of work for the previous three to five years, with five years being preferred
- Annual self-assessments for the previous three to five years, with five years being preferred. For dossiers submitted in 2019, only two self-assessments are required.
- Primary supervisor reviews for the previous three to five years, with five years being preferred (See Appendix D for the definition of a supervisor.)

(Tab II) Departmental Summary Letters and Recommendations
- Letter of recommendation from the institute education directors, program directors or their designated educational director
- Letter of recommendation from:
  - The Regional Director
  - For Field Specialists whose position or duties do not involve work on a regional level, a letter of recommendation is submitted from another individual who exercises supervisory responsibility of the candidate.
  - For Training Institute Specialists the need for a second letter will be determined on a case-by-case basis in consultation with the Extension Policy and Standards Committee Chair.

(Tab III) College/School Summary Letters and Recommendations
- College/School summary of procedures used in review and appeals, all formal votes (before and after appeals)
- Dean’s summary letter and recommendation

(Tab IV) Complete Curriculum Vita (Not to exceed 25 pages)
- MyVita Curriculum Vita for the candidate’s entire work history
- Explanatory notes to expand on or further explain MyVita CV contents

(Tab V) Summary of Accomplishments
- Summary of accomplishments not to exceed 25 pages in area(s) of appointment, which provides evidence of demonstrated effective, consistent and/or sustained achievement in the candidate’s assigned area(s) of responsibility, evidence of excellence, and potential for continued growth. See
Appendix A for the specific structure and examples of evidence, documentation and guidance.

- Up to five samples of work may be included. Each sample of work must not exceed five pages. If more than five samples of work are submitted, only the first five samples will be reviewed. If any sample has more than five pages, only the first five pages will be reviewed.

(Tab VI) External Reviews
- Two letters of academic or equivalent peer review focused on the core competencies
- One review letter from an external partner, collaborator or stakeholder focused on the core duties and competencies
- One colleague/peer review addressing the core duties and competencies
- Appendix E Selection of Outside Reviewers

(Tab VII) Departmental and Divisional Guidelines
- Guidelines with criteria for each level/rank outlined

(Tab VIII) Other
- Other materials as directed
Dossier Standards

- Use 10- to 12-point font.
- Comply with the page counts:
  - Tab IV, Curriculum Vita with optional notes, no more than 25 pages
  - Tab V, Summary of Accomplishments, no more than 25 pages
  - Five samples of work, each sample not to exceed five pages
- The CV must be from MyVita; additional explanatory notes are allowed.
- Include the external peer review, partner/collaborator/stakeholder and colleague/peer review letters and Appendix E.
- The content of the paper and electronic dossiers is the same and must follow the structure on Pages 1–2 and content found in Appendix A.
- Only links to published scholarly work are permitted in the Summary of Accomplishments.
- Dossiers need to show evidence that the work represents years of effective, consistent and/or sustained achievement in the candidate’s assigned area of responsibility since their last promotion. Individuals awarded rank as Assistant or Associate Extension Professionals prior to July 23, 2018 may include all years of Extension experience in their dossiers.
- Electronic dossiers:
  - Request a Box site from Kimberly Shettlesworth, Office of the Vice Chancellor, shettlesworthk@missouri.edu starting August 1 and no later than 11:59 p.m., August 30.
  - All documents will be in PDF format.
  - Scanned documents must be readable.
- Paper dossiers:
  - Place the paper dossier in a light blue pressboard report binder with fasteners along the left side available from the Extension Store (https://extension2.missouri.edu/ued103). If these are not available, the equivalent may be obtained from office supply stores. Ring and spring-clip binders are not acceptable.
  - Samples of work must be in PDF format; no oversized or documents in other formats are acceptable.
  - Label the front of the binder with the following information:
    - Name
    - Division of Extension Dossier In Support of Promotion to the Level of (Associate Extension or Extension Professional)
    - Submission Date
- Sample dossier label:

  IRIS SHAMROCK
  Division of Extension Dossier In Support of Promotion to the Level of
  ASSOCIATE EXTENSION PROFESSIONAL
  October 1, 2018
DOSSIER STANDARDS

- Tabs are labeled with Roman numerals, using these titles:
  - Tab I — Appointment Folder
  - Tab II — Departmental Summary Letters and Recommendations
  - Tab III — College/School Summary Letters and Recommendations
  - Tab IV — Complete Curriculum Vita
  - Tab V — Summary of Accomplishments
  - Tab VI — External Reviews
  - Tab VII — Departmental and Division Guidelines
  - Tab VIII — Other

- Incomplete or late dossiers will not be considered for promotion.
Dossier Responsibilities

Candidates:

- Notify their supervisor of their intent to apply for promotion as soon as possible but no later than 11:59 p.m., August 30.
- Request Box access starting August 1 but no later than 11:59 p.m., August 30.
- Forward to the appropriate supervisor recommendations for four academic or equivalent external reviewers, three partner/collaborator/stakeholder reviewers and the three peer/colleague reviewers no later than 11:59 p.m., August 30.
- Complete, uploading to Box and adding to the paper dossier the following:
  - Inside the front cover
    - Recommendation Signature Page and Record of Formal Votes (Appendix B)
    - History and Recommendation Summary Form (Appendix C)
  - Tab I Appointment Folder documents
    - Plans of Work
    - Self-assessments
    - Annual evaluations
  - Tab IV – Curriculum Vita with any optional notes
  - Tab V
    - Summary of Accomplishments
    - Samples of Work

Regional Directors:

- Provide a letter of recommendation for both County Engagement and Field Specialists assigned to their region. All reviews will remain confidential.
- For County Engagement Specialists, select external reviewers and request their letters of recommendation.
- Complete, upload and, in the paper dossier, include Appendix E.
- Follow up with external reviewers to ensure the letters of recommendation are provided.

Senior Program Directors and Designated Education Directors:

- Senior Program Directors may designate an education director to complete the requirements below.
- Provide a letter of recommendation for both County Engagement and Field Specialists. All reviews will remain confidential.
- For Field Specialists, select external reviewers and request their letters of recommendation.
- Complete, upload and, in the paper dossier, include Appendix E.
- Follow up with external reviewers to ensure the letters of recommendation are provided.
- If applicable, identify an additional supervisor to prepare a letter of recommendation for Specialists with state or program area responsibilities rather than regional responsibilities. Questions concerning an additional supervisor letter should be forwarded to the committee chair.
DOSSIER RESPONSIBILITIES

NTT Support Staff:

- Add to the paper dossiers all letters of recommendation.
- Upload all letters of recommendation to the electronic dossier.
- Inform the appropriate director of any issues with external review letters.
## NTT Process Timeline

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
</tr>
</thead>
</table>
| As soon as possible         | County Engagement Specialists — Notify the Regional Director of your intent to apply for promotion.  
                                  Field Specialists — Notify your Program Director or designated Education Director of your intent to apply for promotion.  
                                  Training Institute Specialists — Notify your Institute Education Director of your intent to apply for promotion.  
                                  Forward four recommendations for external reviewers, three recommendations for partner/collaborator/stakeholder reviewers and three colleague/peer reviewers to the Regional Director for CES and to the Senior Program Director or designated Education Director for Field Specialists or the equivalent.  
                                  Supervisors, in coordination with the candidate, select the external reviewers. For those willing to provide the review, ensure the review letters’ timely submission. |
| August 1                    | Earliest candidates can request Box access                             |
| No later than 11:59 p.m., August 31 | Final opportunity to:  
                                  Notify your supervisor of your intent to apply for promotion and request Box access. Requests for Box access on September 1 or later will not be honored.  
                                  Forward four recommendations for external reviewers, three recommendations for partner/collaborator/stakeholder reviewers and three colleague/peer reviewers to the Regional Director for CES and to the Senior Program Director or designated Education Director for Field Specialists. |
| No later than 11:59 p.m., September 30 | Candidates submit their dossier, one paper copy to their supervisor and one electronic copy via Box. On midnight, October 1, Box access is closed to candidates. |
| As soon as October 1        | Supervisors forward the candidate’s dossier to the external reviewers for their review.  
                                  As needed follow-up to determine the status of the review. |
| No later than 11:59 p.m., November 30 | RDs and PDs or their designated ED complete and forward their letters of recommendation.  
                                  NTT support staff uploads to Box and add to the paper dossier the two letters of recommendation to Tab II and the two external peer review letters, the partner/collaborator/stakeholder letter and the colleague/peer letter to Tab VI.  
                                  Supervisors complete the letters of recommendation and ensure that their letters, the external peer letters, partner/collaborator/stakeholder and colleague/peer letter are uploaded to Box and added to the paper dossier. Box access is closed on midnight, December 1. |
<p>| No later than January 25    | Extension Faculty Policy and Standards Committee Chair provides the Vice Chancellor and candidate with written notice of the committee’s vote and recommendation for promotion. |</p>
<table>
<thead>
<tr>
<th>Date Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>As directed in the promotion notification letter</td>
<td>Candidates not recommended for promotion to the desired rank inform the Extension Faculty Policy and Standards Committee Chair of their desire to appeal and submit any additional evidence addressing the Opportunities For Improvement.</td>
</tr>
<tr>
<td>No later than February 22</td>
<td>Extension Faculty Policy and Standards Committee Chair provides the Vice Chancellor and candidate with written notice of the committee’s vote and recommendation of any appeals.</td>
</tr>
<tr>
<td>March 1</td>
<td>Vice Chancellor of Extension and Engagement forwards the candidate’s dossier, the Extension Faculty Policy and Standards Committee vote and recommendation and the Vice Chancellor’s recommendation to the Provost.</td>
</tr>
<tr>
<td>August 1</td>
<td>Provost completes the reviews of all dossiers, renders a promotion decision.</td>
</tr>
<tr>
<td>September 1</td>
<td>If approved by the Provost, the candidate’s promotion becomes effective.</td>
</tr>
</tbody>
</table>
External Reviews

All external reviews will remain confidential. Reviews of the candidate’s performance are essential components of the promotion process, and they are a critical part of the dossier. External reviews will focus on the core competencies and/or core duties.

The candidate submits recommendations for all external reviewers to the supervisor no later than August 31 using Appendix E. The partner/collaborator/stakeholder recommendations must be from someone the candidate has worked with or who has observed their work in the time covered by the dossier. External peer and partner/collaborator/stakeholder reviewers must be from outside the University of Missouri System.

The supervisor should also compile a list of potential reviewers using Appendix E and will be responsible for selecting two academic or equivalent external reviewers, one the partner/collaborator/stakeholder and one colleague/peer in consultation with the candidate.

The external peer reviewers should be in a position to comment on the core competencies of the candidate. In selecting qualified reviewers, the following criteria apply:

From academic institutions, the reviewer must be a faculty member who:

- Has equivalent or greater rank. If this is not possible, provide an explanation.
- Is an expert of documented state or national stature in a field closely associated with some facet of the candidate’s work
- Is from outside of the University of Missouri System
- Is able to provide an unbiased review*

From non-academic institutions or organizations, the reviewer must be:

- An expert (preferably with a doctorate) of documented state or national stature in a field closely associated with the candidate’s work
- Affiliated with a reputable non-academic institution or organization with a mission pertinent to the candidate’s work
- Able to comment upon candidate’s ability to fulfill the core competencies
- Able to provide an unbiased review*

The partner/collaborator/stakeholder review will address the core duties and/or competencies based solely on their work and observation of the candidate; a dossier will not be provided. This reviewer must:

- Have worked, observed or collaborated with the candidate in the performance of their duties during the time-period covered by the dossier
- Be from outside of the University of Missouri System
- Be able to provide an unbiased review*

* Reviewers who might reasonably be viewed as biased may include, but are not limited to, academic advisors, mentors, former classmates and former colleagues at MU or at other universities.
Colleague/Peer Evaluation

The colleague/peer review will address the core competencies and duties of the candidate. The supervisor will select the faculty member to provide the letter from the three the applicant has recommended. The colleague/peer submits the letter to the supervisor who will ensure it is included in the Tab VI of the candidate’s dossier. The colleague/peer evaluation will remain confidential. The selected colleague/peer must:

- Not be a member of the Extension Faculty Policy and Standards Committee
- Be able to evaluate critically the candidate’s performance for the period covered in the dossier
- Served on a team, or have had substantial interaction with, and/or the opportunity to observe the candidate’s work
- It is strongly encouraged though not mandatory that the colleague or peer have same NTT rank or higher. If not, then the colleague/peer must at a minimum meet the total time in service requirements for the rank the candidate is seeking in addition to the previous requirements.
Promotion Workshops

Each year Extension holds general information sessions on the promotion process open to all faculty and supervisors. The purpose of these work sessions is to communicate details and answer questions concerning the promotion process.
Appendix A.1 – Criteria, Evidence, Documentation and Content Guidance for Promotion to Associate Extension Professional

The candidate applying for associate rank must demonstrate consistency in excellence and achievement with a considerable portfolio of extension work in the Core Competencies of Extension Faculty and in execution of the Core Duties of Extension Faculty producing measurable outcomes over a period of normally at least seven years (five years for those with a PhD). The following criteria are considered:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Examples of Evidence, Documentation and Content Guidance</th>
</tr>
</thead>
</table>
| 1. Summary statement of philosophy, goals, accomplishments and improvements | • Explain, in general terms, what you do, why you do it and what you want to accomplish  
• The remaining criteria items of Educate, Create and Connect demonstrate your success in accomplishing what you explained above  
• Include other thoughts you believe would be helpful for the committee to understand your approach to your work |
| 2. Educate | Evidence of outcomes and quality of delivered extension education and services as derived from learners, clients, communities and stakeholders  
• Summary of instructional, integrated, collaborative and interdisciplinary delivery of presentations, curriculum and programs online, onsite or in person  
• Define your role in delivery of the presentations, curriculum and programs  
• Identify any innovative approaches to fulfilling these criteria  
• Include not only what you did but also why those presentations, curriculum or programs were chosen  
• Discuss the methods of delivery and why those methods were selected  
• Participant numbers and their evaluations  
• Include outcomes resulting from the delivered presentations, curriculum and programs  
• Input from your supervisor in the area of appointment  
• Samples of work  
• Colleague/peer review letter  
• Revenue resulting from your efforts  
• Reports from MyExtension or other sources  
• Whatever is included in responding to these criteria should be documented in your CV. |
### APPENDIX A.1

| Evidence of individual professional development | • Local, state or national conferences, seminars or other educational experiences attended and a description of what knowledge or skills were gained and/or how they were applied  
| • Additional degrees obtained  
| • Self-study activities and the resulting application of what was learned  
| • Involvement in professional organizations and a description of what knowledge or skills were gained and/or how they were applied  
| • Leadership in statewide professional service organizations and a description of what knowledge or skills were gained and/or how they were applied  
| • Whatever is included in responding to these criteria should be documented in your CV. |

#### 3. Create

| Disciplined inquiry, development and improvement of the educational resources and services | • Summarize the curriculum or programs that you developed or collaborated in the developmental process  
| • Clearly define the specifics of your role in each  
| • Include fact sheets, videos and audio intended for use locally or throughout your program area  
| • If allowed the flexibility to modify standardized curriculum or programs, explain how and/or why a curriculum or program developed by others and whose use is directed was improved or modified, your role in making those changes and the reason the changes were needed. Changes can include both content and procedures for delivery.  
| • Identify any innovative approaches to fulfilling these criteria  
| • Samples of work  
| • Colleague/peer review letter  
| • Include the outcomes resulting from your involvement in the creation and modification of the curriculum or programs  
| • Whatever is included in responding to these criteria should be documented in your CV. |

| Application of research in the creation of educational resources and services, scholarly products and other means of effective dissemination of knowledge | • Involvement in research projects  
| • Samples of curricula or programs that include latest research  
| • Publications appearing in journals, magazines, websites, etc. and/or presentations at multistate, national or professional association conferences where a screening or selection process has judged the work worthy of dissemination through that source  
| • Curriculum, software, etc. that has been adopted by other states or professional associations  
| • Include the research necessary to develop the scholarly work  
| • Clearly define the specifics of your role in each |
APPENDIX A.1

- Grant funding when serving as a PI or Co-PI
- Licensing or sales revenue for items purchased for use by other organizations
- Whatever is included in responding to these criteria should be documented in your CV.

4. Connect

Engagement with the needs of diverse learners, clients, communities, stakeholders, partners, funders and/or the public

- Discuss individuals, audiences or groups engaged and the rationale for their engagement to include those judged to be underserved and the means by which all were engaged
- Explain the rationale for groups being identified as underserved
- Means of engagement include participation in local organizations, networking events, systematic recurring visits and/or personal contact, publications, articles, fact sheets, audio and video clips, newsletters, educational resources, websites, blogs, social media, local media appearances, and contributions to eXtension during the time Extension participated in this program
- Innovative approaches to fulfilling these criteria
- Colleague/peer review letter
- Financial support provided by local organizations, groups or government agencies

Service to and engagement with the university, profession and your program discipline

- Evidence of membership and/or leadership in professional service organizations and your role in each
- Involvement in program area and/or Extension planning committees, working groups, etc. and your role in each
- Documentation of continued contribution to mission and goals of Extension, the department, college and/or university
- Local and statewide awards and other types of recognition
- Colleague/peer review letter
- Whatever is included in responding to these criteria should be documented in your CV.
Appendix A.2 – Criteria, Evidence, Documentation and Content Guidance for Promotion to Extension Professional

The candidate applying for promotion for professional rank must demonstrate sustained excellence and achievement with a substantial portfolio of extension work in the Core Competencies of Extension Faculty and in execution of the Core Duties of Extension Faculty producing measurable impacts over a period of normally at least 14 years (10 years for those with a PhD). In addition to measurable impacts, professional candidates are expected to include evidence of new or increased creative works and connection activities. Performance at the same level as an associate since promotion to that rank does not meet the criteria for promotion to professional. The following criteria are considered:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Examples of Evidence, Documentation and Content Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Summary statement of philosophy, goals, accomplishments and improvements</td>
<td>• Explain, in general terms, what you do, why you do it and what you want to accomplish.</td>
</tr>
<tr>
<td></td>
<td>• The remaining criteria items of Educate, Create and Connect demonstrate your success in accomplishing what you explained above.</td>
</tr>
<tr>
<td></td>
<td>• Include other thoughts you believe would be helpful for the committee to understand your approach to your work.</td>
</tr>
<tr>
<td>2. Educate</td>
<td>• Provide a summary of instructional, integrated, collaborative and interdisciplinary delivery of presentations, curriculum or programs delivered online, onsite or in person</td>
</tr>
<tr>
<td></td>
<td>• Include the impact and outcomes resulting from the delivered curriculum and programs</td>
</tr>
<tr>
<td></td>
<td>• Define your role in delivery of presentations, curriculum and programs</td>
</tr>
<tr>
<td></td>
<td>• Identify Innovative approaches to fulfilling these criteria</td>
</tr>
<tr>
<td></td>
<td>• Discuss the methods of delivery and why those methods were selected</td>
</tr>
<tr>
<td></td>
<td>• Include not only what you did but also why those programs or curriculum were chosen</td>
</tr>
<tr>
<td></td>
<td>• Participant numbers and their evaluations</td>
</tr>
<tr>
<td></td>
<td>• Input from your supervisor in the area of appointment</td>
</tr>
<tr>
<td></td>
<td>• Samples of work</td>
</tr>
<tr>
<td></td>
<td>• Colleague/peer review letter</td>
</tr>
<tr>
<td></td>
<td>• Revenue resulting from your efforts</td>
</tr>
<tr>
<td></td>
<td>• Reports from MyExtension or other sources</td>
</tr>
<tr>
<td></td>
<td>• Whatever is included in responding to these criteria should be your CV</td>
</tr>
</tbody>
</table>
### Evidence of individual professional development

- National, state and local conferences, seminars or other educational experiences attended and a description of what knowledge or skills were gained and/or how they were applied
- Additional degrees obtained
- Self-study activities and the resulting application of what was learned
- Involvement in professional organizations and a description of what knowledge or skills were gained and/or how they were applied
- Leadership in national or state professional service organizations and description of what knowledge or skills were gained and/or how they were applied.
- Whatever is included in responding to these criteria should be documented in your CV.

### 3. Create

**Disciplined inquiry, development and improvement of the educational resources and services**

- Summarize curriculum or programs that you developed or collaborated in the development process
- Clearly define the specifics of your role in each
- Include fact sheets, videos and audio intended for use throughout your program area
- If allowed the flexibility to modify standardized programs, explain how and/or why a curriculum or program developed by others, and whose use was directed, was improved or modified; your role in making those changes; and the reason the changes were needed. Changes can include both content and procedures for delivery.
- Identify innovative approaches to fulfilling these criteria
- Samples of work
- Colleague/peer review letter
- Include the outcomes resulting from your involvement in the creation and modification of programs or curriculum
- Whatever is included in responding to these criteria should be documented in your CV.

### Application of research in the creation of educational resources, scholarly products and other means of effective dissemination of knowledge

- Involvement in research projects
- Samples of curricula or programs that include latest research
- Publications appearing in journals, magazines, websites etc. and/or presentations at multistate, national or professional association conferences where a screening or selection process has judged the work worthy of dissemination through those sources
- Curriculum, software, etc. that has been adopted by other states or professional associations
- Include the research necessary to develop the scholarly work.
- Clearly define the specifics of your role in each.
4. Connect

Engagement with the needs of diverse learners, clients, communities, stakeholders, partners, funders and/or the public

- Discuss individuals, audiences or groups engaged and the rationale for their engagement to include those judged to be underserved and the means by which all were engaged.
- Explain the rationale for groups being identified as underserved.
- Means of engagement include participation in local organizations, networking events, systematic recurring visits and/or personal contact, publications, articles, fact sheets, audio and video clips, newsletters, educational resources, websites, blogs, social media, local media appearances and contributions to eXtension during the time Extension participated in this program.
- Innovative approaches to fulfilling these criteria
- Colleague/peer review letter
- Financial support provided by local organizations, groups or government agencies

Service to and engagement with the university, profession and the program discipline

- Evidence of membership and/or leadership in national, multistate or statewide professional service organizations and your role in each
- Involvement in program area and/or Extension planning committees, working groups, etc. and your role in each
- Documentation of continued contribution to mission and goals of university, Extension, and/or your program area
- National, statewide or local awards and other types of recognition
- Colleague/peer review letter
- Whatever is included in responding to these criteria should be documented in your CV.
Appendix B

RANKED NON-TENURE TRACK FACULTY, UNIVERSITY OF MISSOURI EXTENSION
PROMOTION RECOMMENDATION: Effective September 1, 2020
(Recommendation Signature Page and Record of Formal Votes)

Name of Faculty Member: ________________________________________________

Requesting Promotion from: __________________________ to: ______________________
(Assistant, Associate) (Associate, Professional)

Please write "yes" or "no" in the Promotion column, record numerical results of the vote by the Promotion Committee in the Formal Vote column, provide additional information (if applicable) in the Comments column and sign where indicated below.

<table>
<thead>
<tr>
<th>Actions by the following:</th>
<th>Promotion</th>
<th>Promotion Committee Formal Vote</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Director/Unit Supervisor Recommendation (Signature)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Division of Extension NTT Promotion Committee Recommendation (Signature)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vice Chancellor of Extension and Engagement Recommendation (Signature)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provost’s Decision (Signature)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Joint appointments require concurrence of other division.
Appendix C

MU PROMOTION FOR RANKED NON-TENURE TRACK FACULTY
UNIVERSITY OF MISSOURI EXTENSION
History and Recommendation Summary 2019-2020

Name of faculty member: ________________________________

Department or Region: ________________________________

*If a joint appointment, provide name of secondary department: ________________________________

Faculty member’s address: ________________________________

Phone number: ________________________________

Initial appointment date and rank: ________________________________

Current rank: ________________________________

Number of years (since application of the dossier your current rank) in current rank at MU:
_________________ YEARS (as of 8/31/19)

Proposed recommendation: Promotion to rank of: ________________________________

Details of appointment for preceding five years:

<table>
<thead>
<tr>
<th>Academic year</th>
<th>9 mo. term</th>
<th>12 mo. term</th>
<th>$ in Research</th>
<th>% in Traditional Teaching (didactic classroom)</th>
<th>% in Other Teaching (e.g., clinical teaching)</th>
<th>% in Traditional Service (e.g., admin, committee, professional or community)</th>
<th>% in Other Service (e.g., clinical practice)</th>
<th>% in Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018–2019</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2017–2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016–2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015–2016</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2014–2016</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments:

As an addendum, please explain any variation in percentages in the last five years and any differences in the candidate’s appointment for the current academic year.

*Joint appointments require concurrence of other division (submit only ONE dossier per individual.)
Appendix D

DEFINITIONS OF TERMS

1. *Curriculum* — A course created for delivery within a program area online or onsite by individual or multiple Extension faculty that has been through a design and development process. Curriculum includes the presentation material, presenter notes, a lesson or implementation plan, a syllabus, a completed review process to validate the material, marketing resources and evaluation tools. Online curriculum that will not be delivered in an interactive format or by others not involved in its development does not require a lesson or implementation plan, and marketing materials are optional, but must include the other elements. All specialists may develop curriculum. Any Extension faculty member, including educators and assistants, can participate in curriculum development.

2. *Education and services* — These terms referred to in the bylaws are the equivalent of programs, curriculum and presentations as used in these guidelines.

3. *Evidence* — Examples of output, outcomes, impacts, quality or improvements collected by the faculty member. Sources may include surveys, interviews, focus groups or program and curriculum records.

4. *Impact* — The measurable results from the outcomes of Extension programs, services or curriculum. Measurable results include, but are not limited to, economic, social, environmental, personal or civic.

5. *Institute* — A collective term to shorten the text when referring to the Missouri Training Institute, Fire and Rescue Training Institute and the Law Enforcement Training Institute and others.

6. *Outcomes* — Changes in knowledge, actions, attitudes or conditions of an individual, group or organization resulting from the delivery of Extension presentations, services, curriculum and programs. Changes could include behaviors, practices, actions, decisions or policies.

7. *Output* — Conducted and completed activities involving an individual, group or organization and the associated learning. Activities include personal contact and the delivery of a program, curriculum or service, presentation and the development of publications and scholarly products. Learning could include new knowledge, skills or abilities.

8. *Presentation* — Any activity conducted by Extension faculty designed to provide knowledge, information or skills to an individual, group or organization. Presentations can be the means to deliver curriculum or services, or are created in response to a local need. Presentations include material developed or delivered by any faculty member for one-time or repetitive use.

9. *Professional development* — Activities and efforts to increase, improve or sustain a faculty member’s knowledge, skills and abilities. Such activities and efforts can include attending training events offered by national and regional organizations, Extension in Service Education (ISEs), program area training events and self-study through reading or involvement in national or regional organizations whose mission aligns with the individual’s programmatic responsibilities.
10. **Program** — A coordinated set of learning experiences designed to achieve predetermined outcomes. Program development follows a continuum starting with initial environmental scanning and identification of a need or gap; determining programming priorities; and the development of learning experiences and application activities that culminate in changes in knowledge, behavior, skills and attitudes. These changes manifest as measurable program outcomes.

11. **Research (scientific and applied)** — Research is the activity associated with developing new or validating existing knowledge that is disseminated through the delivery of presentations, curriculum, programs, consultations, professional/scholarly publications and presentations, etc.

12. **Scholarly work** — Publications appearing in journals, magazines, websites etc. and/or presentations at multistate or national conferences where a screening or selection process has judged the work worthy of dissemination through that source; curriculum, software, etc. adopted by other states or professional associations. Scholarly work also includes the research necessary to develop the publication or presentation.

13. **Supervisor** — A generic term used to shorten the text. For County Engagement Specialists the primary supervisor is the Regional Director. For Field Specialists the primary supervisor is the senior program or designated education director. For Training Specialists the primary supervisor is the institute education director or a designated unit supervisor.
Appendix E

PROCEDURE FOR SELECTION OF OUTSIDE REVIEWERS
UNIVERSITY OF MISSOURI EXTENSION NON-TENURE TRACK
FACULTY PROMOTIONS, 2019-2020

Name of faculty member: ___________________________ Department or Region: _______________________

Faculty member being considered for promotion to: _________________________________________________
(Example: Promotion to Assistant Extension Professional)

Contact person for external reviewer selection: _____________________________________________________

Check all that apply:

<table>
<thead>
<tr>
<th>Name: ________________________________</th>
<th>Institution: ________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nominated by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Candidate</td>
<td>Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name: ________________________________</th>
<th>Institution: ________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nominated by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Candidate</td>
<td>Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name: ________________________________</th>
<th>Institution: ________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nominated by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Candidate</td>
<td>Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name: ________________________________</th>
<th>Institution: ________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nominated by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Candidate</td>
<td>Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name: ________________________________</th>
<th>Institution: ________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nominated by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Candidate</td>
<td>Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name: ________________________________</th>
<th>Institution: ________________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nominated by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Candidate</td>
<td>Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other</td>
</tr>
</tbody>
</table>
### Partner/Collaborator/Stakeholders Reviewers

<table>
<thead>
<tr>
<th>Name: ______________________________</th>
<th>Accepted*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role: ☐ Partner ☐ Collaborator ☐ Stakeholder</td>
<td>Yes ☑ No ☐</td>
</tr>
<tr>
<td>Selected by: ☐ Yes ☐ No</td>
<td></td>
</tr>
<tr>
<td>Nominated by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Candidate</td>
<td></td>
</tr>
</tbody>
</table>

Please include, on an addendum to this page, a brief description of the reviewer selection process.
APPENDIX E

*If a selected reviewer did not respond, please explain the circumstances on the addendum.

**If any other method was used, please explain on the addendum.

The names of every person contacted should appear on this form. All reviews received must be included in the dossier.

Nominations for reviewers should be made by the supervisor in consultation with the faculty member. Individuals with personal ties to the candidate should be excluded.
Appendix F

Suggested wording of initial email requesting a review of candidate’s dossier by the external peers and stakeholder/partner/collaborator

Dear ______:

(Name) who is a faculty member in Extension at the University of Missouri is being evaluated for promotion to the rank of (associate extension professional/extension professional) in the next few months. To provide an external review of the candidate’s worthiness for promotion, your name was suggested. I am writing to ask if you could provide us with an independent evaluation of her/his competencies by ______ (date). If you have been a mentor, or friend of this candidate, please contact me before agreeing to do the review.

Please let me know as soon as possible if you are available to undertake this review. I will then provide specific guidance and the promotion dossier by ___ (date). These will be sent by mail or email.

I would be very grateful for your assistance in our review of the candidate. Please let me know by ___ (one week from now) if you will undertake the review.

Sincerely,

Supervisor
Phone number
Email address
Appendix G

Follow-up letter for requesting a review of candidate’s dossier by the external peers and stakeholder/partner/collaborator

Dear ______:

Thank you for agreeing to review the dossier of (candidate) as he/she applies for promotion. If successful, he/she would advance from (title) to (title).

In terms of his/her career, this consideration is an important event, and we want to obtain the broadest evidence of the merits of his/her candidacy for promotion. One way to gather this evidence is by seeking expert advice from people such as you who are particularly able to evaluate a candidate for promotion. We would appreciate your candid opinion of his/her qualifications and any other information you can provide that will help in making a wise decision. Letters of recommendation that are analytical and evaluative are more instructive to those making a promotion recommendation than letters that are merely supported by generalizations. We are especially interested in your evaluation of the candidate in the following areas:

1. The context in which you know the candidate
2. The candidate’s professional competency
3. The quality and significance of the candidate’s work
4. The candidate’s state, regional or national reputation and relative standing in (his/her) field
5. Your professional and personal evaluation of the candidate
6. Any additional information you believe would help us in making a promotion decision. For example, what difference has his/her work made? What impact has it had?
7. You may have other relevant thoughts about this candidate that you wish to share with us that do not fall neatly into one category or another. This is a good place to report those thoughts.

Our promotion dossier requires that candidates provide evidence of their performance in the three core duties of a Missouri Extension Specialist as established by their job descriptions and plans of work. These are:

Educate — Extension Faculty deliver education and services to designated audiences that produce outcomes (for associates and professionals) and impact (professionals)

Create — Extension Faculty develop education and services and scholarly work
Connect — Extension Faculty engage learners, clients, volunteers, partners, stakeholders, donors, funding agencies and Extension

Since the specifics of a candidate’s responsibilities as they relate to the Core Duties may be difficult to assess from your perspective we ask that you review the entire dossier for evidence that the candidate has displayed the following Core Competencies during their performance of the three Core Duties:

**Communication** — The ability to listen and to communicate effectively orally and in writing

*Educational programming and knowledge of subject matter* — The ability to plan, design, implement, evaluate, account for and report the impact of significant extension education programs that improve the quality of life for extension learners

**Inclusivity** — The awareness, commitment and ability to include broad cultural perspectives in programming

**Information and education delivery** — The ability to effectively deliver educational programs and information in a way that meets the learning styles of the target audience

**Interpersonal relations** — The ability to successfully interact with individuals and groups to create partnerships, networks and dynamic human systems

**Knowledge of organization** — Understanding the scope of Extension as it is carried out on campus and in the field

**Leadership** — The ability to proactively influence a wide range of diverse individuals and groups positively

**Organizational management** — The ability to establish structure, organize processes, generate and monitor revenue and lead change to obtain educational outcomes effectively and efficiently

**Professionalism** — The demonstration of behaviors that reflect high levels of scholarship and performance, a strong work ethic and a commitment to self-assessment, continuing education and to the mission, vision and goals of Extension

Sincerely,

(Regional Director or Unit Supervisor) Enclosure(s)
NTT Promotion Guidelines
Candidate’s Dossier

*Note to person sending this letter: The dossier sent to the reviewer should include the candidate’s CV and all documents under Tab V of his/her dossier.*