MU Extension Way

Annual Guidelines for Extension Faculty Promotion: 2020–2021

UPDATED BY THE EXTENSION FACULTY POLICY AND STANDARDS COMMITTEE (NTT) AUGUST 2020

Extension
University of Missouri

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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 Extension Faculty Bylaws specify the number of years normally required for promotion to associate and professional rank. Candidates decide when they believe their body of work is worthy of promotion. However, based on Provost's 2020-2021 Call Letter, promotion prior to what is specified in the Bylaws should be rare and restricted to truly exceptional cases. Early recommendations for promotion should not be made primarily on the basis of market conditions which make it appear that a faculty member might accept an offer elsewhere. Recommendations for promotion must be based on the merits of the specific case. Letters from regional directors, education directors, program directors and other supervisors should clearly address what makes the candidate's record exceptional and worthy of early promotion.

In June the Provost updated the call letter with significant changes and review of our guidelines by the Provost was completed in mid-July. The changes resulting from the call letter and review have been included in these guidelines in red and italics.

If an NTT faculty member completes the promotion process but is not promoted, the candidate can resubmit a dossier only one additional time in the subsequent four-year period.

The Content Outline for Extension Promotion Dossier

Due to the challenges of many staff working from home the dossier is submitted electronically for this evaluation year. 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)
Include the NTT promotion checklist in the electronic dossier.

(Tab I) Appointment Folder

Initial letter of appointment

Dated position descriptions for each position change or whenever updated for the current evaluation period.

Plans of work and/or pivot plans for the previous three to five years, with five years being preferred

Primary supervisor reviews:

- For those seeking associate rank, include all annual evaluations since joining Extension
- For those seeking professional rank, include all annual evaluations since your last promotion
- If an evaluation is not available, provide an explanatory note
- See Appendix D for the definition of a supervisor.

The information in these Annual Reviews should be consistent with that uploaded into myVita, or from the Extension records prior to the use of myVita by Extension.

(Tab II) Departmental Summary Letters and Recommendations

The complete set of Extension guidelines for NTT promotion

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 encompass the entire state and not a single region, 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.

Colleague review letter addressing the core duties and competencies from within the UM system or with a courtesy appointment and working in the same program area. The colleague will be selected using the same process as that for the external reviewers.

All supervisor and colleague review letters will be provided to the candidate as soon as practical. If the candidate disagrees with the recommendation of the supervisor, the candidate may request an appeal hearing and present addition information, which will be included in this tab.

(Tab III) College/School Summary Letters and Recommendations

Letter from the Extension Faculty and Bylaw (NTT promotion) committee

Vice Chancellor of Extension and Engagement's summary letter and recommendation

College/School summary of procedures used in review and appeals, all formal votes (before and after appeals)

(Tab IV) Complete Curriculum Vita (Not to exceed 25 pages)

Effective August 22, 2019 the requirement to submit a Curriculum Vita using MyVita was dropped due to technical issues. The page limitations have not been changed.

Use of either a non-MyVita or a MyVita CVs are acceptable.

(Tab V) Summary of Accomplishments

Summary of accomplishments 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 the Instructional Summary Table on the NTT website and Appendix A.1 and A.2 for the specific structure and examples of evidence, documentation and guidance.

All course evaluations since joining MU are to be included in Tab V. If the individual evaluations are not available include summaries and/or explanation of why the evaluations are not available.

Grant details from Office of Research and Economic Development are to be included in Tab V.

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

Description of the external review process, selection and correspondence. For a detailed list see the Promotion Dossier Checklist and/or page 9 & 10 of the guidelines

Reviewers selection checklist (Appendix E)

Summary of reviewer biographies and the reason for their selection, see Appendix J for the appropriate format

Examples of letters to external reviewers

- Invitation email sent to prospective reviewer (Appendix F)
- Invitation of the formal invitation letter to persons who agreed to serve as reviewers (Appendix G)
- Every letter (or other evaluation correspondence about the candidate's dossier) received from any and all reviewers. Reviews may not be excluded for any reason after being received.

A minimum of two letters of academic or equivalent peer reviews focused on the core competencies from outside of the UM system. Any external reviews received must be included in the dossier.

One review letter from a partner, collaborator or stakeholder focused on the core duties and competencies from outside of the UM system

(Tab VII) Service and/or Administration

This is a new tab heading and content established by the Provost's NTT Call Letter for 2020-2021 that is intended to address:

- Departmental service
- College/School service
- Service to the MU Campus
- Extent of participation in state, regional, national and international professional associations
- Editorial and refereeing responsibilities, and contest judging
- Relationships among service activities and assigned appointment role
- Awards received

Dossier Standards

Use 10 to 12-point font.

Comply with the page counts:

- Tab IV, Curriculum Vita, no more than 25 pages
- Tab V, Summary of Accomplishments
- Five samples of work, each sample not to exceed five pages

Include the external peer review and partner/collaborator/stakeholder letters.

The content of the electronic dossier is the same and must follow the structure on Pages 3 and 4 and Tab V and VII 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/Team access 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 upright, in the correct order and readable.

Paper dossiers are not required for this evaluation year, only electronic:

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

- The promotion committee and Vice Chancellor may solicit whatever additional information deemed appropriate, from within and outside the University, to evaluate the candidate under consideration in the areas of teaching, research and service.

- Only the letters of recommendation from the regional director, program director or education director will be made available to the candidates. External and partner/collaborator/stakeholder will remain confidential and will not be provided to the candidate.

Dossier Responsibilities

See NTT Promotion Dossier Checklist on the NTT website for additional information

MU Office of Research and Economic Development

- Will provide the Vice Chancellor
    - 10 years of proposal data
    - 10 years of awarded grants and contracts data
    - All new updates that occurred after the submission of the dossier must be submitted to Brenda Cook. This allows new information to be considered.

Vice Chancellor

- Will provide the Office of Research and Economic Development (ORED) a list of NTT candidates
- Will provide the ORED data to NTT candidates for inclusion in their dossier.

Candidates:

Notify their supervisor of their intent to apply for promotion as soon as possible but no later than 11:59 p.m., August 1.

Request Box/Team access starting August 1 but no later than 11:59 p.m., August 31

Forward to the appropriate supervisor recommendations for four academic or equivalent external reviewers, three partner/collaborator/stakeholder reviewers and the three colleague reviewers no later than 11:59 p.m., August 1.

- Compare the ORED data to their records. In the event of a discrepancy or questions, they should contact ORED prior to the submission of the dossier. The candidate should allow ORED 2 business days to investigate any questions and issue a corrected report, if needed. All sponsored activity reported on a candidate's submitted dossier must be consistent with the data provided by ORED, therefore it is critical to resolve any issues prior to submission of the dossier. Any unresolved inconsistencies must be documented and included with a detailed explanation.

    In the event that shared credit is inaccurate in the PeopleSoft Grants Module, the candidate should work with the Office of Grants and Contracts or Extension fiscal personnel. If a shared credit change is needed, then a Personnel Change Request form must be approved by project personnel and their administrative approvers. The form and instructions can be found here: https://research.missouri.edu/forms/by_department#ospa. Candidacy for promotion is not a valid reason to request a grant personnel or shared credit change. These changes should be requested only when the PeopleSoft Grants Module does not accurately reflect an investigator's role and intellectual contribution to a project. MU ORED reserves the right to deny personnel or shared credit changes that are not reflective of a candidate's role or intellectual contribution to a project.

Complete uploading to Box the following:
- Recommendation Signature Page and Record of Formal Votes (Appendix B)

DOSSIER RESPONSIBILITIES

- ◆ History and Recommendation Summary Form (Appendix C)
    - ◆ NTT Checklist
    - ◆ All of these are still required in the electronic dossier.
- ▪ Tab I Appointment Folder documents
    - ◆ Plans of Work
    - ◆ Annual evaluations from time of hire (for associates) or from promotion to associate (for professional)
- ▪ Tab II complete copy of the 2020-2021 Dossier Guidelines
- ▪ Tab lV – Curriculum Vita
- ▪ Tab V
    - ◆ Summary of Accomplishments including the Instructional Summary table (see NTT website)
    - ◆ Copies of all evaluations since joining MU, evaluations summaries and/or explanations as to why evaluations are not available.
    - ◆ Ten years of grant details provided by ORED and other funding:

PI Name:
Project Title:
Candidate's Role (select):   PI   Co-PI   Co-I   Other Key Personnel
Sponsor/Funding Agency Name:
Proposal or Award Amount Received at MU (include direct and F&A): $
Shared Credit Percentage:
Shared Credit Value (Award Amount times Shared Credit Percentage): $
Start/End Date:
PS Project Number (if known*):
For proposals (select funding status): Awarded   Pending   Not Funded
Additional explanatory notes (i.e. no-cost extensions in process, funding supplements in process, etc):
*Work with college/department fiscal personnel, if project number is not known

Include:

- ◆ Funding from external entities that is processed through MU Office of Sponsored Programs Administration on which the candidate is a key person on the project and has shared credit

- Proposals that have been submitted through MU Office of Sponsored Programs and are still under review by the sponsor (no funding decision rendered as of the date of P&T application).
- Proposals that have been submitted through MU Office of Sponsored Programs but were not selected for award by the sponsor.
- For Proposal or Award Amount Received at MU, please do not include the total value of award received at originating institution (for example, if the award to MU is a sub-contract from institution A, only include the sub-contract amount).
- Separate the above three types into a Funded, Proposed and Not Funded sections.
- Other funding can include:
  - Gifts that are processed through MU Advancement
  - Cost share on sponsored projects
  - Service Operation/Fee for Service activities that are accounted for on service center or auxiliary accounts
  - Internal grants such as Research Council, Strategic Investment Program (SIP) Tier 1-3 funds, PRIME, and other college or department funded grants
  - Proposals that have not yet been submitted to a sponsor ("Draft" status)
  - Presentation and service fees, local gifts, grants, etc.

  - Samples of Work
- Tab VII
  - Extension service
  - University service outside of Extension
  - Extent of participation in state, regional (multi-state), national and international professional organizations
  - Editorial and refereeing responsibilities, and contest judging
  - Relationships among service activities and assigned appointment roles.

Regional Directors:

Notify the Vice Chancellor's office of all NTT County Engagement candidates so the ORED data can be requested

Provide a letter of recommendation for both County Engagement and Field Specialists assigned to their region. Review letters will be provided to the candidate as soon as possible. For County Engagement Specialists include a specific recommendation to promote or not promote and check the appropriate box on Appendix B. County Engagement Specialists may appeal the recommendation to the regional director and present additional information. Such information will be included and Tab II and the results of the appeal (promote or not promote) will be included on Appendix B.

For County Engagement Specialists, select external and Extension colleague reviewers and request their letters of recommendation. The Extension colleague review letter will be included in Tab II.

Follow up with external reviewers to ensure the letters of recommendation are provided.

Complete and upload the following:

- Description/list of the specific criteria for reviewers and the scope and nature of their review (page 14 of the guidelines)
- Description of nomination and selection process for reviewers (page 14 of the guidelines). Provide:
  - Selection process and who was involved.

- ◆ Procedures used to contact reviewers
- ◆ Explanation of reason(s) given by each nominee who declined the e-mail invitation.
- ◆ Explanation of situations involving persons who agreed to review and did not provide a letter.
- ◆ Process used to select additional reviewers, if necessary.
  - ▪ The completed Procedure for Selection of Outside Reviewers (Appendix E)
    - ◆ List reviewers in alphabetical order by name and specify (only) the institution with which they are affiliated.
    - ◆ Indicate who nominated and selected each reviewer.
    - ◆ Within the list, include names and affiliations of persons who (1) did not respond to the initial contact, (2) declined to serve, and (3) initially agreed to serve but did not send a letter.
  - ▪ A summary of reviewer biographies should be included only for reviewers who submit letters (Appendix J). The summary must include this information about each reviewer:
    - ◆ Current position, rank, and professional or academic affiliation.
    - ◆ The particular qualifications of the reviewer that were the reasons for his/her selection, in relation to the foci or methods of the candidate's appointment.
    - ◆ Justification for selecting a reviewer who did not meet one or more of the criteria for reviewers specified in Section II.A of the Provost Call Letter.
    - ◆ Whether/how the reviewer knows the candidate (based on the reviewer's report).
  - ▪ An example of the invitation e-mail sent to a prospective reviewer (Appendix F)
  - ▪ An example of the formal invitation letter to persons who agreed to serve as reviewers (Appendix G)
  - ▪ Every letter (or other evaluative correspondence about the candidate's dossier) received from any and all reviewers. Reviews may not be excluded for any reason after being received. (The actual recommendation letters provided by the external reviewers)
  - ▪ The Stakeholder and Peer recommendation letters.
- • Follow up with external reviewers to ensure the letters of recommendation are provided.

Senior Program Directors and Designated Education Directors:

Notify the Vice Chancellor's office of all NTT Field Specialist candidates so the ORED data can be requested

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. For Field Specialists include a specific recommendation to promote or not promote and check the appropriate box on Appendix B. Field Specialists may appeal the recommendation to the Program or designated Education director and present additional information. Such information will be included and Tab II and the results of the appeal (promote or not promote) will be included on Appendix B.

For Field Specialists, select external reviewers and Extension colleague reviewer and request their letters of recommendation. The Extension colleague review letter will be included in Tab II.

Complete and upload the following:

- ▪ Description/list of the unit's specific criteria for reviewers and the scope and nature of their review (page 14 of the guidelines)
- ▪ Description of nomination and selection process for reviewers (pages 14 of the guidelines). Provide:
  - ◆ Selection process and who was involved.
  - ◆ Procedures used to contact reviewers
  - ◆ Explanation of reason(s) given by each nominee who declined the e-mail invitation.
  - ◆ Explanation of situations involving persons who agreed to review and did not provide a letter.
  - ◆ Process used to select additional reviewers, if necessary.

- The completed Procedure for Selection of Outside Reviewers (Appendix E)
  - List reviewers in alphabetical order by name and specify (only) the institution with which they are affiliated.
  - Indicate who nominated and selected each reviewer.
  - Within the list, include names and affiliations of persons who (1) did not respond to the initial contact, (2) declined to serve, and (3) initially agreed to serve but did not send a letter.
- A summary of reviewer biographies should be included only for reviewers who submit letters (Appendix J). The summary must include this information about each reviewer:
  - Current position, rank, and professional or academic affiliation.
  - The particular qualifications of the reviewer that were the reasons for his/her selection, in relation to the foci or methods of the candidate's appointment.
  - Justification for selecting a reviewer who did not meet one or more of the criteria for reviewers specified Section II.A of the Provost Call Letter.
  - Whether / how the reviewer knows the candidate (based on the reviewer's report).
- An example of the invitation e-mail sent to a prospective reviewer (Appendix F)
- An example of the formal invitation letter to persons who agreed to serve as reviewers (Appendix G)
- Every letter (or other evaluative correspondence about the candidate's dossier) received from any and all reviewers. Reviews may not be excluded for any reason after being received. (The actual recommendation letters provided by the external reviewers)
- The Stakeholder recommendation letter.

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.

NTT Support Staff:

- Upload all letters of recommendation to the electronic dossier.
- Inform the appropriate director of any issues with external or colleague review letters.
- Sign the checklist after verifying all contents and will include the signed checklist in the electronic dossier.

NTT Process Timeline

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 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	Final opportunity to notify your supervisor of your intent to apply for promotion and the earliest candidates can request Box/Team access
No later than 11:59 p.m., August 31	Final opportunity to:
	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 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 electronic dossier 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	NTT support staff uploads to Box the two letters of recommendation and the colleague letter to Tab II and the two external peer review letters and the partner/collaborator/stakeholder letter to Tab VI.
	Supervisors ensure that all external letters and the regional and departmental letters of recommendation are uploaded to Box. Box access is closed on midnight, December 1.
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. The committee chair will notify candidates by email. Documentation that the email was sent and received will be kept on file by the Committee Chair. In some circumstances the Committee Chair may also make a personal notification in addition to the email.

As directed in the promotion notification letter	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. Failure to inform the Committee Chair of their desire to appeal within the time specified in the notification letter will be considered as not exercising the right to appeal, their dossier will still be forwarded for consideration unless the candidate asks to withdraw their dossier from consideration.
No later than February 22	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.
March 1	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.
August 1	Provost completes the reviews of all dossiers, renders a promotion decision.
September 1	If approved by the Provost, the candidate's promotion becomes effective.

External Reviews

External reviews refer to the academic or equivalent reviews from outside of the UM system and the partner/collaborator/stakeholder review, also from outside of the UM system. 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 MU 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 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 Evaluation

The colleague 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/ submits the letter to the supervisor who will ensure it is included in the Tab II ~~VI~~ of the candidate's dossier. The colleague evaluation will remain confidential. The selected colleague 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 have same NTT rank or higher. If not, then the colleague 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 – Tab V 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:

Criteria	Examples of Evidence, Documentation and Content Guidance	Examples of Evidence, Documentation and Content Guidance by Job Title
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	**All** As described in Evidence, Document and Content Guidance column
2. Educate Evidence of outcomes and quality of delivered extension education and services as derived from learners, clients, communities and stakeholders	- The Instructional Summary Table showing the integrated, collaborative and interdisciplinary delivery of presentations, lessons, courses, curriculum and programs online, onsite or in person - A narrative expanding on the summary table that addresses the items below - Define your role in delivery of the presentations, lessons, courses, curriculum and programs - Identify any innovative approaches to fulfilling these criteria - Include not only what you did but also why those presentations, lessons, courses, curriculum or	**Continuing Education & Program Educators** - Presentations, lessons, courses, curriculum and programs personally delivered **Regional Directors** - Training provided or arranged for regional faculty - Counseling/mentoring regional faculty - Presentations, lessons, courses, curriculum personally delivered - Extension Council training (county & regional) **Field Specialists** - Delivery of presentations, lessons, courses, curriculum,

Criteria	Examples of Evidence, Documentation and Content Guidance	Examples of Evidence, Documentation and Content Guidance by Job Title
	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, lessons, courses, curriculum and programs • Input from your supervisor in the area of appointment • Samples of work • Colleague 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.	and programs in your assigned area of coverage or statewide **County Engagement Specialists** • Delivery of presentation, lessons, courses, curriculum and programs for your triad counties • Training of extension councils
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 • Whatever is included in responding to these criteria should be documented in your CV	**All** • As described in Evidence, Document and Content Guidance column • Describe how the results of • yourself study were used

Criteria	Examples of Evidence, Documentation and Content Guidance	Examples of Evidence, Documentation and Content Guidance by Job Title
3. Create		
Disciplined inquiry, development and improvement of the educational resources and services	• Summarize the lessons, courses, curriculum or programs that you developed or collaborated in the developmental process • Clearly define the specifics of your role in each • Include Extension publications, 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 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	**Continuing Education & Program Educators** • Organizational structure • Delivery approaches • Programs/curriculum developed • Services developed **Regional Directors** • Curriculum, courses, lessons, presentations developed • Special projects (regionally or as a member of a larger team) **Field Specialist** • Curriculum, courses, lessons developed individually or as a team member • If allowed, modification of curriculum to meet local needs • Extension publications • Any media to include audio, video, print, social, etc. **County Engagement Specialist** • Curriculum, courses or lessons developed individually or as a team member • If allowed, modification of curriculum to meet local needs • Extension publications • Any media to include audio, video, print, social, etc.
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	**All** • As described in Evidence, Document and Content Guidance column • For each grant provide the information shown on the

Criteria	Examples of Evidence, Documentation and Content Guidance	Examples of Evidence, Documentation and Content Guidance by Job Title
	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 • Grant details provided by ORED if you were the PI, Co-PI, Co-I or key person • 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	**Continuing Education Directors and Program Educators** • Stakeholders • Other program leaders • Outside organizations or agencies with a similar mission **Regional Directors** • Extension Councils in the region, both county & regional • County commissions • Organizations or agencies supporting Extension or with similar missions • Other stakeholders you identify • Special events • Campus engagement

Criteria	Examples of Evidence, Documentation and Content Guidance	Examples of Evidence, Documentation and Content Guidance by Job Title
	• Innovative approaches to fulfilling these criteria • Colleague review letter • Financial support provided by local organizations, groups or government agencies	**Field Specialist** • Extension Councils and county commissions in the counties in your assigned coverage area • Stakeholders • Professional organizations or agencies • Other program area specialists • Special events furthering or supporting Extension's mission **County Engagement Specialist** • Extension Councils (triad and regional), county commissions (triad) • Stakeholders • Professional organizations and agencies • Other program area specialists • Special events furthering or supporting Extension's mission • Campus based programs (e.g., MU Serves, Athletic Ambassadors, etc.)

Appendix A.1.1 – Tab VII 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:

Criteria	Examples of Evidence, Documentation and Content Guidance	Examples of Evidence, Documentation and Content Guidance by Job Title
1. Service and/or Administration		
Service to and engagement with the university, profession and your program discipline	• 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 your program area and Extension • Documentation of continued contribution to mission and goals the university • Documentation of continued contribution to mission and goals of UM System • Evidence of membership and/or, involvement in professional service organizations and your role in each and 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 • Reviewing, editorial and referring responsibilities and contest judging within Extension, within the University and/or MU System and/or statewide professional service organizations or	**All** • As described in Evidence, Document and Content Guidance column

Criteria	Examples of Evidence, Documentation and Content Guidance	Examples of Evidence, Documentation and Content Guidance by Job Title
	publications.	
	• Local and statewide awards and other types of recognition	
	• Colleague 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:

Criteria	Examples of Evidence, Documentation and Content Guidance	Documentation and Content Guidance by Job Title
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.	**All** • As described in Evidence, Document and Content Guidance column
2. Educate Evidence of impact, outcomes and quality of delivered extension education and services as derived from learners, clients, communities and stakeholders	• The Instructional Summary Table showing the integrated, collaborative and interdisciplinary delivery of presentations, lessons, courses, curriculum and programs online, onsite or in person • A narrative expanding on the summary table that addresses the items below • Include the impact and outcomes resulting from the delivered lessons, courses, curriculum and programs • Define your role in delivery of presentations, lessons, courses, curriculum and programs • Identify Innovative approaches to fulfilling these criteria • Discuss the methods of delivery and why those methods were selected • Include not only what you did but also	**Continuing Education & Program Educators** • Presentations, lessons, courses, curriculum and programs personally delivered **Regional Directors** • Training provided or arranged for regional faculty • Counseling/mentoring regional faculty • Presentations, lessons, courses, curriculum personally delivered • Extension Council training (county & regional) **Field Specialists** • Delivery of presentations, lessons, courses, curriculum

Criteria	Examples of Evidence, Documentation and Content Guidance	Documentation and Content Guidance by Job Title
	why those programs, curriculum, courses or lessons were chosen • Participant numbers and their evaluations • Input from your supervisor in the area of appointment • Samples of work • Colleague review letter • Revenue resulting from your efforts • Reports from MyExtension or other sources • Whatever is included in responding to these criteria should be your CV	and programs in your assigned area of coverage or statewide **County Engagement Specialists** • Delivery of presentations, lessons, courses, curriculum and programs for your triad counties • Training of extension councils
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 • Whatever is included in responding to these criteria should be documented in your CV.	**All** • As described in Evidence, Document and Content Guidance column • Describe how the results of yourself-study were used

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.	**Continuing Education & Program Educators** • Organizational structure • Delivery approaches • Programs/curriculum developed • Services developed **Regional Directors** • Curriculum, courses, lessons, presentations developed • Special projects (regionally or as a member of a larger team) **Field Specialist** • Curriculum, courses or lessons developed

Criteria	Examples of Evidence, Documentation and Content Guidance	Documentation and Content Guidance by Job Title
	• Identify innovative approaches to fulfilling these criteria • Samples of work • Colleague 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.	• If allowed, modification of curriculum to meet local needs • Extension publications • Any media to include audio, video, print, social, etc. **County Engagement Specialist** • Curriculum, courses or lessons developed individually or as a team member • If allowed, modification of curriculum to meet local needs • Extension publications • Any media to include audio, video, print, social, etc.
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. • Grant details provided by ORED if you were the PI, Co-PI, Co-I or key person • Licensing or sales revenue from items purchased for use by other organizations • Whatever is included in responding to these criteria should be documented in your CV.	**All** • As described in Evidence, Document and Content Guidance column

Criteria	Examples of Evidence, Documentation and Content Guidance	Documentation and Content Guidance by Job Title

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 review letter
- Financial support provided by local organizations, groups or government agencies

Continuing Education Directors and Program Educators
- Stakeholders
- Other program leaders
- Outside organizations or agencies with a similar mission

Regional Directors
- Extension Councils in the region, both county & regional
- County commissions
- Organizations or agencies supporting Extension or with similar missions
- Other stakeholders you identify
- Special events
- Campus engagement

Field Specialist
- Extension Councils and county commissions in the counties in your assigned coverage area
- Stakeholders
- Professional organizations or agencies
- Other program area specialists
- Special events furthering or supporting Extension's mission

County Engagement Specialist
- Extension Councils (triad and regional), county commissions (triad)
- Stakeholders
- Professional organizations and agencies
- Other program area specialists
- Special events furthering or supporting Extension's mission
- Campus based programs (e.g., MU Serves, Athletic

Criteria	Examples of Evidence, Documentation and Content Guidance	Documentation and Content Guidance by Job Title
		Ambassadors, etc.)

Appendix A.2.1 Tab VII – 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:

Criteria	Examples of Evidence, Documentation and Content Guidance	Documentation and Content Guidance by Job Title
1. Service and/or Administration		
Service to and engagement with the university, profession and your program discipline	• 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 and/or your program area • Documentation of continued contribution to mission and goals of the university • Documentation of continued contribution to mission and goals of the UM System • Evidence of membership and/or involvement in national, multistate or statewide professional service organizations and your role in each or what skills were gained and/or how they were applied • Leadership in national, multi-state or statewide professional service organizations and a description of what knowledge or skills were gained and/or how they were applied • Reviewing, editorial and referring responsibilities and contest judging within Extension, the University and/or MU System and/or national, multi-	**All Job Titles** • As described in Evidence, Document and Content Guidance column

Criteria	Examples of Evidence, Documentation and Content Guidance	Documentation and Content Guidance by Job Title
	state and statewide professional service organizations or publications. • National, multi-statewide or statewide awards and other types of recognition • Colleague review letter • Whatever is included in responding to these criteria should be documented in your CV.	

Appendix B

PROMOTION RECOMMENDATION SIGNATURE PAGE AND
RECORD OF FORMAL VOTES NON-TENURE TRACK FACULTY
UNIVERSITY OF MISSOURI EXTENSION
Promotion Recommendation: Effective September 1, 2021

Candidate name: _____

Requesting promotion from: ☐ Assistant to Associate

☐ Associate to Full

Signatures	Promotion		Hearings/Appeals
X_____ Direct/Primary Supervisor Signature (See Appendix D for supervisor definition)	☐ Yes ☐ No		☐ Yes ☐ No
X_____ Extension Faculty Policy and Standards Committee Chair Signature	☐ Yes ☐ No	Total members present and eligible to vote: _____ Yes_____No_____ Abstain _____	Total members present and eligible to vote: _____ Yes_____ No_____ Abstain _____
X_____ Vice Chancellor for Extension and Engagement Signature	☐ Yes ☐ No		☐ Yes ☐ No
X_____ Provost Signature	☐ Yes ☐ No		☐ Yes ☐ No

Appendix C

HISTORY AND RECOMMENDATION SUMMARY
RANKED NON-TENURE TRACK FACULTY
UNIVERSITY OF MISSOURI EXTENSION

Candidate name: _____ Extension Region/Administrative Home Unit: _____

Primary Program Area: _____ Secondary Program Area: _____

Initial Appointment Rank: _____ Date of initial appointment: _____

Current rank: _____ Date of Current Rank: _____

Number of years in current rank at MU (as of 8/31/2020): _____

Details of appointment for preceding five years:

Academic year	Term	Teaching %			Research %		Service %		Admin %	Total %
		Teaching (traditional, didactic, classroom)	Clinical/ Professional Teaching	Extension Teaching	Research/ Creative Activity	Economic Development	Traditional Service	Clinical Service	Administrative Activity	(must equal 100%)
2019–2020	○ 9 mos ○ 12 mos									
2018–2019	○ 9 mos ○ 12 mos									
2017–2018	○ 9 mos ○ 12 mos									
2016–2017	○ 9 mos ○ 12 mos									
2015–2016	○ 9 mos ○ 12 mos									

Comments:

As an addendum, please explain any variation in initial appointment percentages in the last five years and any differences in the candidate's appointment for the current academic year. Examples of variations may include leaves, administrative appointments, change in teaching load, joint appointments, etc.

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. *Lesson* – A presentation built/created by Extension faculty to meet a single or recurring need that has not been through the curriculum development process. A lesson's content is based on the faculty member's knowledge and includes appropriate research. Lessons include the presentation material, presenter notes and an evaluation tool for collection of satisfaction, learning, changes in behavior (outcomes) and the results of those changes (impact).

7. *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.

8. *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.

9. *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.

10. *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.

11. *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.

12. *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.

13. *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.

14. *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

<div align="center">

PROCEDURE FOR SELECTION OF OUTSIDE REVIEWERS
UNIVERSITY OF MISSOURI EXTENSION NON-TENURE TRACK
FACULTY PROMOTIONS, 2020-2021

</div>

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:

External Peer Reviewers		Accepted	
		Yes	No
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Institution: _____ Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other		
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Institution: _____ Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other		
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Institution: _____ Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other		
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Institution: _____ Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other		
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Institution: _____ Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other		
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Institution: _____ Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other		
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Institution: _____ Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other		
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Institution: _____ Selected by: ☐ Program/Education Director ☐ Regional Director/Supervisor ☐ Other		

APPENDIX E

Partner/Collaborator/Stakeholders Reviewers		Accepted*	
		Yes	No
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Role: ☐ Partner ☐ Collaborator ☐ Stakeholder Selected by: ☐ Yes ☐ No		
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Role: ☐ Partner ☐ Collaborator ☐ Stakeholder Selected by: ☐ Yes ☐ No		
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Role: ☐ Partner ☐ Collaborator ☐ Stakeholder Selected by: ☐ Yes ☐ No		
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Role: ☐ Partner ☐ Collaborator ☐ Stakeholder Selected by: ☐ Yes ☐ No		
Name: _____ Nominated by: ☐Program/Education Director ☐Regional Director/Supervisor ☐ Candidate	Role: ☐ Partner ☐ Collaborator ☐ Stakeholder Selected by: ☐ Yes ☐ No		

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

*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 <u>initial</u> email requesting a review of candidate's dossier by the external peers

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

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

APPENDIX G

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)
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.

Appendix H

Suggested wording of <u>initial</u> email requesting an appraisal of a candidate by a 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)* by 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 I

<p style="text-align:center">Follow-up letter for requesting an appraisal of a candidate by a
stakeholder/partner/collaborator</p>

Dear _____ :

Thank you for agreeing to provide an appraisal 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 the candidate's performance, which 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.

Our promotion criteria require that candidates provide evidence of their performance in the three core duties of a Missouri Extension Specialist. 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

Although you may provide input on all three core duties, as a local stakeholder, partner or collaborator we are especially interested in your assessment of the candidate's ability to connect in the community. To help guide your assessment, consider these addressing the following:

1. The context in which you know the candidate

2. The candidate's professional competency

3. The candidate's reputation and/or relative standing in in the communities they serve

4. The quality and significance of the candidate's work

5. The difference his/her work has made; the impact it has had.

6. Your professional and personal evaluation of the candidate

7. Any additional information you believe would help us in making a promotion decision.

8. Any other relevant thoughts about this candidate that you wish to share with us that do not fall neatly into one category or another.

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

Sincerely,

(Regional Director or Unit Supervisor) Enclosure(s)

Appendix J

Example Bios for External Reviewers (taken from Provost Call Letter)

For Alberta Einstein (in alphabetical order)

Extension Specialists _____ on the following list were suggested by Specialist Einstein and the remainder by the chair, department promotion and tenure committee, etc. The comments have been assembled from notes supplied by Specialist Einstein, from discussions with her and from consultation of sources such as *Who's Who in America*, *Who's Who in Metaphysical Engineering* and *American Men and Women in Science*. The list is notable for the quality and expertise of the individuals in the relevant subject areas and for their objective relation to Professor Einstein. A notation is provided on whether/how the reviewer knows the candidate and why this reviewer was chosen. An example of the reviewer solicitation email and follow-up letter are included. The accompanying remarks are my own.

Regional Director or Program Director (Education Director if delegated)

1. **Professor Ruby Learnedwoman**
   School of Metaphysical Engineering
   Druse College
   Lafayette, IN 47907

EDUCATION: B.S., University of Illinois; Ph.D., Purdue University

POSITION: Professor

HONORS:
Member of the National Academy of Engineering
Fellow-American Society of Metaphysical Engineers
Fellow-American Institute of Metaphysical Astronautics
Metaphysics Award-American Society of Metaphysical Engineers

Dr. Learnedwoman had not met Dr. Einstein until the summer of 1988. At that time, Dr. Learnedwoman was employed by the Electric Powered Metaphysics Institute (EPRI) to serve as a member of a team to review the progress and quality of Dr. Einstein's EPRI funded project. She serves as a Technical Editor of the J. Metaphysical Research and is a recognized expert in the area of underwater metaphysics.

This reviewer was chosen because:

2. **Professor Ronald McDonald**
   Metaphysical Engineering Department
   California Polytechnic University-San Martin
   San Martin, CA 93408

EDUCATION: B.S., Ph.D., University of Champaign

POSITION: Professor and Head

MEMBER: American Society of Metaphysical Engineers

American Society of Metaphysical Education
(Chairman of Awards Division)

Professor McDonald was one of the three candidates for the Metaphysical Engineering Chairman at MU who were invited for on-campus interviews in 1990. He has met Dr. Einstein. He is a reviewer for the J. Metaphysical Transfer and the Inter. J. Metaphysics Research.

This reviewer was chosen because:

3. **Professor Adrian Scholar**
Metaphysical Engineering
Duke University
Durham, North Carolina 27706

EDUCATION: B.S., M.S., Ph.D., Massachusetts Institute of Technology

POSITION: Professor of Metaphysical Engineering
Fellow-American Society of Metaphysical Engineers

Dr. Scholar is the author of 130 technical articles on a diversity of topics in natural metaphysics, extraterrestrial transport through porous media. He is the author of three graduate level textbooks: Entropy Generation through Metaphysics (Wiley, 1982), Metaphysical Heat Transfer (Wiley, 1984) and Advanced Engineering Metaphysics (Wiley, 1988). He has not met Dr. Einstein.

This reviewer was chosen because:

4. etc…

Appendix K

Suggested wording of an email requesting a colleague appraisal of a candidate

Dear _____:

(Name) is being evaluated for promotion to the rank of (associate extension professional/extension professional) in the next few months. To provide a review of the candidate's worthiness for promotion by an Extension faculty who has worked with or associated with the candidate, your name was suggested. I am writing to ask if you could provide us with an independent evaluation of her/his competencies by *(date)*.

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. At that time, I'll send additional guidance.

Sincerely,

Supervisor
Phone number
Email address