Annual Guidelines for Extension Faculty Evaluation and Promotion

2024-2025

Contents

Introduction

The evaluation areas for promotion of Non-Tenure Track (NTT) faculty should be consistent with the established academic standards of excellence for each discipline. Evaluation of the candidate's application for promotion must focus on the specific area of appointment (teaching, research, clinical and professional practice, extension, and library) as well as service and professional activities related to that primary responsibility. As stated in CRR 310.035C., "There is no prohibition for NTT faculty to be involved in multiple duties related to research, teaching, or service. However, decisions regarding… evaluation of NTT faculty performance should relate to the primary purpose of their appointment as defined by category and not be based on all three criteria."   Typically, "Extension Teaching" is the primary purpose of appointment for Extension NTT faculty. Appointment categories may be found in Extension's job descriptions.

NTT promotion requires going beyond satisfactory performance; it is not a reward for longevity. The promotion case packet 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 B: Definition of Terms.

The case packet 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 case packet and provide guidance on the evidence, documentation, content, and technical parameters for submission.

Case packets are reviewed at the following levels: primary and secondary supervisors (or supervisors as determined); The Extension Promotion Advisory Committee; and the Vice Chancellor for Extension and Engagement. Each level provides a letter of recommendation. These recommendations are then forwarded to the provost for final review. All committee deliberations remain confidential.

The Extension Faculty Bylaws specify the number of years normally required for promotion to associate and professional rank:

For promotion to Associate Extension Professional:
> Applicant should have 5 years of experience as an Assistant Extension Professional at time of application (case packet) submission.

> The candidate for promotion 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*.

For promotion to Extension Professional:
> Faculty member should have 5 years of experience as an Associate Extension Professional at time of application (case packet) submission.

> The candidate for promotion 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*.

Case packets 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 case packet.

Candidates decide when they believe their body of work is worthy of promotion. However, based on the provost's 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 primary and secondary supervisors, or supervisors as determined, should clearly address what makes the candidate's record exceptional and worthy of early promotion.

Faculty members with fewer than 5 years at Assistant Rank or 5 years at Associate Rank may still apply for promotion; however, it will be considered an early application and candidate will need to present evidence of exceptional qualification for early promotion.

Satisfaction of minimum criteria at the department, college, and university levels is not sufficient to ensure promotion. Judgments are based on evidence of sustained productivity, excellence, and potential for future contributions to the University. A candidate's total contribution to the missions of the unit and the University should guide faculty votes. Promotion recommendations are subjected to rigorous and thorough examination at each ensuing level of review.

Internal reviews at all levels 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. If additional materials are solicited at any level, those should be added to the case packet and the candidate should be notified about the addition. If an NTT faculty member completes the promotion process but is not promoted, the candidate can resubmit a case packet only one additional time in the subsequent four-year period.

Case packet documents are uploaded into the Review, Promotion & Tenure system (RPT). PowerPoint training guides for the candidate and supervisors' use of RPT are available on the provost website, within the Promotion and Tenure tab. Case packets that are not prepared according to guidelines, are late, or incomplete will not be considered for promotion.

Questions about the Extension NTT promotion process should be emailed to the chair of the Extension Faculty Policy and Standards Committee as listed below:
> Melissa Scheer, scheermb@missouri.edu
> Gene Schmitz, schmitze@missouri.edu

Timeline and Due Dates

If a deadline falls on a weekend, the deadline is extended to the next business day.

July 1, 2024	Deadline for candidates to submit list of external reviewer nominations to primary supervisor Primary supervisor also makes list of external reviewer nominations. Primary supervisor and candidate discuss nominations Primary supervisor makes final selection of reviewers and is responsible for ensuring all reviewers meet required qualifications.
August 1, 2024	Deadline for primary supervisors to email initial requests to potential external reviewers (see Appendix C) Primary supervisor is responsible for obtaining a CV from each external reviewer who agrees to provide a letter.
September 2, 2024	Primary supervisor submits "External Reviewer Nominations and Selections" spreadsheet, located on Extension NTT webpage, to Kim Shettlesworth by email. Primary supervisor completes and submits the external reviewer biographies and emails it to Kim Shettlesworth as a Word document (see Appendix F).
September 30, 2024	Deadline for candidate to submit Candidate Packet Section materials into RPT. Deadline for candidate to submit Candidate Packet Section materials into OneDrive Folder (folder provided by Kim Shettlesworth).
October 1-2, 2024	Kim Shettlesworth reviews case packets for technical requirements. Packets that don't meet requirements will be returned to candidate for corrections.
October 4, 2024	Using RPT, Kim Shettlesworth sends email and candidate materials to external reviewers.
November 15, 2024	Deadline for external reviewers to upload letter into RPT.
November 18, 2024	Primary and secondary supervisors gain access to case packets in RPT.

December 13, 2024	Deadline for primary and secondary supervisors to upload letters of recommendation and submit recommendation forms in RPT.
Late December/Early January	Reconsideration hearings are held at the primary and secondary supervisor level.
December 16, 2024	Case packets become available to the Extension Promotion Advisory Committee in RPT.
Early January, 2025	Chair of the Extension Promotion Advisory Committee uploads letters of recommendation and submits recommendation forms within RPT.
Mid-January, 2025	Reconsideration hearings are held at the Extension Promotion Advisory Committee level.
Mid-January to early February, 2025	Vice Chancellor for Extension and Engagement gains access to case packets for review and uploads letters of recommendation and recommendation forms in RPT.
Mid- to late-February, 2025	Reconsideration hearings are held at the Vice Chancellor level.
March 1, 2025	Case packets are forwarded to Provost's office for final review.
Spring to early summer, 2025	Provost provides decision letter to candidate. Reconsideration hearings are held at the provost level.
September 1, 2025	If approved by provost, candidate's promotion becomes effective.

The Case Packet

The case packet consists of two sections—the candidate section and the internal case section. Only the documents listed below may be uploaded. Each document must be in PDF format, upright with no blank pages, typed using 10–12-point font, and organized in a manner that makes each document easy to follow. PDFs must not have bookmarks (see Appendix G). File names of the PDFs should be named exactly as listed below.

Candidate Packet Section

The candidate is responsible for uploading the following documents as PDFs into RPT and to candidate's One Drive folder. Documents must be named as shown below.

Appointment
- A.   Appointment Letters
- B.   Annual Reviews
- C.   Department NTT Promotion Guidelines
- D.   NTT Appointment History Form

Complete CV
- E.   Complete CV-*Last Name, First Name*

Documentation of Primary Activity
- F.   Summary of Accomplishments
- G.   Teaching Philosophy
- H.   Student Feedback on Teaching Table
- I.   Student Feedback on Teaching Comments
- J.   Summary of Student Advising
- K.   Peer Teaching Reviews- *Reviewer's Last Name*
- L.   Grant Details

Service and/or Administration
- M.   Service Achievements
- N.   Service Evaluation Letters-*Evaluator's Last Name*

Detailed information regarding contents of the candidate packet section (Items A- N)

A. **Appointment Letters**
Although this document is named "Appointment Letters," this is a single PDF that combines the following in the below order:
   a. **Appointment Letters** - include initial letter of appointment, any and all promotion or reappointment letters, and approved title corrections in chronological order (oldest to most recent). All years must be included. If letter is not available, candidate is required to insert a page in place of letter providing a brief explanatory note.
   b. **Dated position descriptions** for each position change or whenever updated for the current evaluation period, arranged from most recent to oldest
   c. **Plans of work and/or pivot plans** for the previous three to five years, with five years being preferred, arranged from most recent to oldest. Content of pivot plans should be up-right, easy-to-read and properly sized to fill standard Letter-sized or Legal-sized paper.

B. **Annual Reviews**
   a. This document will include your annual reviews (evaluations) conducted by your primary supervisor. For those seeking associate rank, include all annual reviews since joining Extension. For those seeking professional rank, include all annual reviews since your last promotion. 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.
   b. Do not include annual self-evaluations.
   c. This is saved as one individual document, with reviews arranged from most recent to oldest.
   d. All reviews must be included. If a review is not available, insert a page in place of review providing a brief explanatory note.

C. **Department NTT Promotion Guidelines**
Upload the 2024-2025 Annual Guidelines for Extension Faculty Evaluation and Promotion. This document is found on the [Extension NTT website](#).

D. **NTT Appointment History Form**
   a. Note: Kim Shettlesworth will work with you to make sure form is filled out accurately.
   b. Fill out the NTT Appointment History form that is found on the [provost website](#), within the promotion and tenure tab, then upload the form as a PDF into RPT.
   c. Name of individual is to be entered as it appears in Peoplesoft, with no nicknames or abbreviations.
   d. If necessary, additional information can be added by adding additional pages to the form to explain any variations in percentages over the last five years, and if differences in percentages are due to appointments such as grants, leaves, summer appointments, or administrative duties. Any changes to regular assigned duties should be reflected in the percentages indicated on each academic year.

E. Complete CV

In the CV, candidates for promotion to Associate Extension Professional should emphasize relevant achievements since their appointment at MU. Candidates for promotion to Extension Professional should emphasize achievements since their last promotion. The CV should not exceed 25 pages in length.

    a. Include professional development and achievements

F. Summary of Accomplishments

Provide a clear summary of accomplishments in area(s) of appointment, which provide evidence of demonstrated effective and sustained achievement in the candidate's assigned area(s) of responsibility, evidence of excellence and potential for continued growth.

    a. See Appendices A.1, A.1.2, A.2 and A.2.1 for the specific structure and examples of evidence, documentation and guidance.

    b. Include five samples of work at end of document. 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.

    c. Each sample of work should be a stand-alone, representation of the candidate's original work. The candidate must have contributed significant effort in the creation or revision of team-developed materials. Examples include:

- PowerPoint presentations or other materials created for programming
- Curriculum development or revision
- Peer reviewed publications/articles including guide sheets or other fact sheets
- Newsletter articles or news releases written by the candidate and submitted to various media outlets

Refer to Appendix A.1. or Appendix A.2. under "3. Create," see information for Field Specialists.

    d. Only links to published scholarly work are permitted in the Summary of Accomplishments.

G. Teaching Philosophy

Candidate's Extension teaching philosophy, no more than one page in length.

H. Student Feedback on Teaching Table

    a. This table is found on the [Extension NTT website](#).

    b. The completed table includes each course taught or team-taught

        i. since MU appointment (for candidates to associate) or since the last promotion. Please do not depart from this format.

    c. Course table must be FULLY complete, including average rating and program evaluation standard. Do not leave blank cells. If something is not applicable, provide explanatory note.

    d. Below the table, the candidate is to write a paragraph interpreting trends in data (i.e., perceived reason(s) for changes in ratings over time, with different courses/levels of courses, and adjustments/changes in teaching methods/approaches.)

I. Student Feedback on Teaching Comments

    a. All qualitative student written comments are to be included for courses taught over the most recent five years.

b. Teaching evaluation comments are to be typed into the form found here on the [Extension NTT website](#).

c. Comments that are discriminatory may be redacted from the data set. In consultation with department chairs, individual faculty members can remove irrelevant and unfair characterizations. In the event that the candidate and the primary or secondary supervisor disagree about a redaction(s), the matter should be arbitrated by the Vice Chancellor for Extension and Engagement's office. In the event that resolution cannot occur at the Vice Chancellor's level, the matter would be finally arbitrated by the Provost Office. Examples of discriminatory comments that may be removed include:

   i. Comments that reference race, gender, ethnicity, etc.
   ii. Comments that reference instructor appearance (e.g., clothing, hair, physical features, etc.)
   iii. Comments using profane, offensive, hostile or otherwise inappropriate language
   iv. Comments that are otherwise racist, sexist, homophobic, etc.
   v. Written comments can often allow evaluators to identify specific successes, as well as problems, in the learning environment. Evaluators should avoid highlighting isolated, unrepresentative, outlier comments and instead focus on recurring thematic patterns within written comments. Such comments can often helpfully contextualize the quantitative ratings.
   vi. If the individual evaluations are not available, include summaries and/or explanation of why the evaluations are not available.
   vii. Teaching evaluation comments obtained after candidate submission of case packet are to be submitted to appropriate staff to be added to case packet.

J. Summary of Student Advising

This item is not required by Extension. However, the candidate must still upload a PDF into RPT. Simply state "This item is not relevant to Extension NTT Promotion Guidelines" in the body of the document.

K. Peer Teaching Reviews

Peer reviews are expected for all promotion cases with official teaching assignments. These reviews should not be letters of endorsement written for the packet. They should not be evaluations written by students (or former students). The collection of peer reviews should cover courses from multiple semesters to represent the candidate's teaching over an extended period of time. Peer reviews should involve class visits and reviews of teaching materials. At least two, but no more than four, peer reviews of teaching representing different semesters and different courses should be submitted (each Peer Teaching Review must be titled: Peer Teaching Review-*reviewers last name* and uploaded as separate documents). Reviewers must use this peer teaching review form developed by Task Force to Enhance Learning and Teaching (TFELT) in collaboration with the campus community:
https://missouri.qualtrics.com/jfe/form/SV_cMWWR3ovUnDRSo6

a. Peers should assess teaching style and faculty-student interaction in the classroom or on-line, as well as aspects of course design.
b. For candidates for Professional, include only peer evaluations done since the last promotion.
c. Peer reviews DO NOT make a recommendation regarding promotion.

d. Peer reviews may be conducted by colleagues at any career stage and/or rank, from either inside or outside of the department. Peer reviewers should be chosen and assigned by the department chair, but faculty can always request an alternate colleague to conduct their review. The candidate should not be required to identify and secure their own peer reviewers, although they may elect to provide suggestions to the department chair.

e. Peers may be co-teachers.

f. Reviews may be of a variety of forms of education delivery and may include:

    a. Content sharing and education delivery at Extension Council, 4-H Council or Advisory groups, minimum 15 minutes in length

    b. Education delivery with small groups or individuals

g. How the process works: The peer reviewer clicks on the TFELT link provided above. The peer reviewer provides his/her email address as well as the candidate's email address. After the peer reviewer submits the form, the candidate will receive an automated email with a link to access the review. This link also allows the candidate to save a PDF of the review. Candidate then uploads PDF into case packet.

h. Note: If candidate has selected his/her reviewer and obtained a completed peer review prior to the publication of these guidelines, candidate may include those peer review(s) in case packet. After publication date of these guidelines, Regional Directors should identify faculty member(s) to serve as peer reviewer.

L. Grant Details

Kim Shettlesworth, shettlesworthk@missouri.edu, will provide candidates with the following information from the MU Division of Research, Innovation and Impact (RII):

    a. 10 years of proposal data including all the above data elements

    b. 10 years of awarded grants and contracts data including all the above data elements

MU RII obtains data from the PeopleSoft Grants Module, which is the official institutional record of externally funded sponsored activity. Candidates should review the data provided by RII. In the event of a discrepancy or questions, they should contact RII via grantsdc@missouri.edu prior to the submission of the case packet. The candidate should allow RII two business days to investigate any questions and make any necessary corrections. All sponsored activity reported on a candidate's submitted packet must be consistent with the data provided by RII, therefore it is critical to resolve any issues prior to submission of the packet. Any unresolved inconsistencies must be documented and included with a detailed explanation.

If the candidate believes shared credit information on an award is inaccurate in the PeopleSoft Grants Module, the candidate should work with their department research administrators (DRAs) and RII Sponsored Programs Administration (SPA) to submit the correction forms. 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://docs.research.missouri.edu/ospa/personnel-change-form.pdf. Candidacy for Promotion and Tenure 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. Requested changes must be reviewed and approved by department and Dean level approvers. Those

individuals have the right to deny personnel or shared credit changes that are not reflective of a candidate's role or intellectual contribution to a project.

SPONSORED FUNDING - **For each proposal or award, provide the following using this format:**

Investigator (Candidate) Name:
Award Title:
Candidate's Role (select):   PI   Co-PI   Co-I   Other Key Personnel
Direct Sponsor/Funder:
Originating Sponsor/Funder (if different than direct):
Proposal or Award Anticipated MU Total (include direct and F&A): $
Candidate's Shared Credit Percentage:
Candidate's Shared Credit Amount: $
Award Start/End Date:
PS Award (or Project) Number(s) (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 (in reference to table above):
- a. Funding from external entities that is processed through MU Office of Sponsored Programs Administration (SPA) on which the candidate is a key person on the award and has shared credit on the award's associated projects
- b. Proposals that have been submitted through MU SPA and are still under review by the sponsor (no funding decision rendered as of the date of P&T application)
- c. Proposals that have been submitted through MU SPA but were not selected for award by the sponsor
- d. For Proposal or Award Anticipated MU Total, 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 to MU)

e. Separate the above three types into Funded, Proposed and Not Funded sections

OTHER FUNDING (if these exist, include in an "Other Funding" section, not Sponsored Funding. Use the same table format as above):
a. Gifts that are processed through MU Advancement
b. Cost share on sponsored projects
c. Service Operation/Fee for Service activities that are accounted for on service center or auxiliary accounts
d. Internal grants such as Research Council, Strategic Investment Program (SIP) Tier 1-3 funds, PRIME, and other college or department funded grants
e. Proposals that have not yet been submitted to a sponsor ("Draft" status)

M. Service Achievements
Candidate's overall description of service responsibilities should be listed with dates, under the separate headings (as relevant) to designate the level of service performed, such as: Department Service, College/School Service, Service to MU Campus, Service to UM System/Extension, Participation in State-Regional-National-and International Professional Associations, Editorial and Refereeing Responsibilities, and Relationships among the candidate's service activities/teaching responsibilities/and research program. The candidate may discuss how their service activities are aligned with their teaching and/or scholarship.

N. Service Evaluation Letters (optional)
This item is not required for Extension. However, candidates may choose to include a maximum of three solicited letters evaluating service contributions. Documents must be titled: Service Evaluation Letter-*Evaluator's Last Name.* If candidate chooses to not include service evaluation letters, candidate will not upload anything into RPT for this item.

Updating the Candidate Packet Section

After submission of the case packet, candidates may update their information as applicable. Candidates may submit Student Feedback on Teaching Comments obtained after submission and other items as applicable, such as new grants or publications. Updates should be dated and labeled with the appropriate Section and Document Title (example: Grant Details-Addendum 2025.02.28) and include the updated information only. If the same information is intended for multiple sections of the packet, prepare separate pages labeled appropriately for each section. Updates should be in PDF format.

1. If submitting updates between October 1, 2024 and February 28, 2025, email document(s) to Kim Shettlesworth, shettlesworthk@missouri.edu
2. If submitting updates after March 1, 2025, email document(s) to Brenda Cook, cookbj@missouri.edu

Internal Case Sections

The internal case sections contain the following documents uploaded by primary and secondary supervisors, the Extension Promotion Advisory Committee Chair, the Vice Chancellor for Extension and Engagement, and the Extension promotion coordinator, Kim Shettlesworth. All documents must be PDF files and named exactly as written below. Candidates do not have access to these sections.

External Evaluations
   A. List Specific Criteria for External Reviewers
   B. Description-Nomination and Selection
   C. Procedures for Selection of Outside Reviewers
   D. External Reviewer Biographies
   E. Example – Email Invite to be Reviewer
   F. Example – Formal Invite Letter to Reviewers Who Agreed to Serve
   G. Evaluation from-*External Evaluator's First and Last Name*

Committee Recommendations
   Recommendation Letters:
      A. Primary Supervisor Recommendation Letter
      B. Secondary Supervisor Recommendation Letter
      C. Extension Committee Recommendation Letter
      D. Extension Vice Chancellor Recommendation Letter

   Recommendation Forms:
      A. Primary Supervisor Recommendation Form
      B. Secondary Supervisor Recommendation Form
      C. Extension Committee Recommendation Form
      D. Extension Vice Chancellor Recommendation Form

Packet Checklists-Staff Section
      1) Case Packet Checklist-Candidate Packet
      2) Case Packet Checklist-Post Department Reviews
      3) Case Packet Checklist-Post College Reviews

Responsibilities for Internal Case Sections documents

Primary Supervisor is responsible for:
1. Completing "External Reviewer Nominations and Selections" spreadsheet (available on [Extension NTT website](#)) and emailing it to Kim Shettlesworth, shettlesworthk@missouri.edu.
2. Completing "External Reviewer Biographies" (Appendix F) and emailing it to Kim Shettlesworth.
3. Uploading letter of recommendation into RPT
4. Submitting Recommendation Form within RPT
5. Note: Kim Shettlesworth will share letter with candidate within RPT and inform candidate he/she has 5 business days to request corrections to factual errors in letter.

Secondary Supervisor is responsible for:
1. Uploading letter of recommendation into RPT
2. Submitting Recommendation Form within RPT
3. Note: Kim Shettlesworth will share letter with candidate within RPT and inform candidate he/she has 5 business days to request corrections to factual errors in letter.

Chair of the Extension Promotion Advisory Committee is responsible for:
1. Uploading letter of recommendation into RPT
2. Submitting Recommendation Form within RPT
3. Note: Kim Shettlesworth will share letter with candidate within RPT and inform candidate he/she has 5 business days to request corrections to factual errors in letter.

Vice Chancellor for and Engagement is responsible for:
1. Uploading letter of recommendation into RPT
2. Submitting Recommendation Form within RPT
3. Note: Kim Shettlesworth will share letter with candidate within RPT and inform candidate he/she has 5 business days to request corrections to factual errors in letter.

Detailed information regarding the contents of the internal case sections

External Evaluations

A. Description/list of the unit's specific criteria for external reviewers

B. Description of nomination and selection process for this candidate's reviewers. Include: number of reviewers nominated by candidate, department committee, and department chair respectively
   1. selection process and who was involved in it
   2. procedures used to contact reviewers (e-mail)
   3. process used to select additional reviewers, if necessary

C. The completed "Procedure for Selection of Outside Reviewers" form.

1. This form is completed and uploaded by Kim Shettlesworth in the Vice Chancellor's office.

D. A summary of reviewer biographies.
  1. Primary supervisor creates this item using Appendix F as an example, and emails the Word document to Kim Shettlesworth
  2. Primary supervisor to include biographies on reviewers who *agreed* to provide a letter.
  3. List reviewers alphabetically by last name
  4. The summary must include this information about each reviewer:
     i. Current position, rank, and academic affiliation (if applicable)
     ii. The particular qualifications of the reviewer that were the reasons for their selection, in relation to the candidate's work
     iii. Justification for selecting a reviewer who did not meet one or more of the criteria
     iv. Whether/how the reviewer knows the candidate (based on the reviewer's report)

E. An example of the e-mail sent to invite an individual to consider serving as an external reviewer.

F. An example of the formal invitation letter to individuals who agreed to serve as reviewers.

G. Every letter (or other evaluative correspondence about the candidate's packet) received from any and all reviewers. Reviews may not be excluded for any reason after being received. With the use of the External Evaluation Request feature in RPT, external evaluation letters will be uploaded into the candidate's packet by the External Evaluator themselves. Monitoring of received or outstanding letters can be done within each candidate's case. A minimum of four and no more than six letters, on letterhead and with signatures, are required. If more than six letters are received, only the first six that were submitted will be considered.

Committee Recommendations

Recommendation Letters

A. Primary and Secondary Supervisor Recommendation Letters – Note: If a candidate does not have a secondary supervisor, a letter from another individual who exercises supervisory responsibility of the candidate may be selected in consultation with The Extension Promotion Advisory Committee and/or the Vice Chancellor for Extension and Engagement.

  Letters should include:
  1. An overview of the candidate's accomplishments, especially while at MU
  2. Any deviations from the expectations cited in the appointment letter should be explicitly explained in some detail
  3. Exceptions to requirements specified in department promotion guidelines must be explained
  4. Generally accepted standards of quality within the discipline, both on this campus and nationally

5. Interdisciplinary relevance of the work, if applicable, and an evaluation of the interdisciplinary work
6. When relevant, an appraisal of the quality of outlets where the work has appeared
7. When relevant, an overview of institutional support received (e.g., start-up funds, release time, internal grants), and appropriate expectations for achieving external funding
8. For promotion to Extension Professional, appraisal of achievements in the area of appointment since the last promotion and appraisal of service contributions expected at that rank (department level, campus-level, off-campus service at the national level)
9. For early promotion, the letter should address what makes this case truly exceptional; simply fulfilling the departmental guidelines early is not sufficient
10. A recommendation with rationale
11. If supervisor recommendation letter references an external review letter, it must not contain any information that could be an identifier of an external evaluator (such as reviewer name or institution). It is recommended to use numbering or lettering (1,2,3/A.,B,C) of external reviewers instead of actual names.

B. Extension Promotion Advisory Committee Recommendation Letter should include:
1. Numerical results of all formal votes (before and after hearings)
2. Issues relevant to outcomes of votes if such issues were discussed at the meeting
3. Any known explanation for split or dissenting votes or majority negative votes
4. Comments supplied by the committee concerning disagreement with external review letters and negative votes
5. A recommendation with rationale
6. If committee recommendation letter references an external review letter, it must not contain any information that could be an identifier of an external evaluator (such as reviewer name or institution). It is recommended to use numbering or lettering (1,2,3/A.,B,C) of external reviewers instead of actual names.

C. Extension Vice Chancellor Recommendation Letter should include:
1. An overall evaluation of the candidate's work, including interdisciplinary work
2. Any special circumstances that should be considered
3. A perspective on any differences of opinion at prior levels of review
4. A clear statement of the reasons for the recommendation
5. If Vice Chancellor recommendation letter references an external review letter, it must not contain any information that could be an identifier of an external evaluator (such as reviewer name or institution). It is recommended to use numbering or lettering (1,2,3/A.,B,C) of external reviewers instead of actual names.

Recommendation Forms

This is a form that must be filled out within each RPT candidate case at each review level, at the same time as the recommendation letter is being uploaded and can only be completed by the Extension primary and secondary supervisors, the chair of the Extension Promotion Advisory Committee, and the

Vice Chancellor for Extension and Engagement at their respective review levels. The form documents the rank the candidate was reviewed for, recommendation made, and the vote count. Committee names can also be entered as documentation if the recommendation letter does not indicate each committee member. These individuals are responsible for filling out and saving a recommendation form within RPT:

1. Primary Supervisor
2. Secondary Supervisor (or supervisor as determined)
3. Chair of Extension Promotion Advisory Committee
4. Vice Chancellor for Extension and Engagement

External Review Letters

External letter requirements for candidates applying for **Associate Extension Professional:**
1. One (1) letter from a partner, collaborator, or stakeholder is required. If more than 1 letter is received, all letters will be included in the case packet; however, only the first letter that was submitted will be considered.
2. Academic or equivalent peer letters **will not** be solicited for those applying for associate rank.

External letter requirements for candidates applying for **Extension Professional:**
1. Academic or equivalent peer (minimum of 3 required; maximum of 5 allowed; only 1 may be an equivalent peer). If more than 5 letters are received, all letters will be included in the case packet; however, only the first 5 will be considered.
2. Partner, collaborator, or stakeholder (1 letter is required). If more than 1 letter is received, all letters will be included in the case packet; however, only the first letter that was submitted will be considered.

Letter requirements
1. Must focus on the core duties and/or core competencies of Extension
2. Must be signed and on letterhead
3. Letters will remain confidential and will not be provided to the candidate

Criteria for academic or equivalent peer reviewers (for candidates applying for Extension Professional):
1. From academic institutions, the reviewer must be a faculty member who:
    a. Is outside of the UM System
    b. Has equivalent or greater rank. If this is not possible, provide an explanation.
    c. Is an expert of documented state or national stature in a field closely associated with some facet of the candidate's work.
    d. Is affiliated with a reputable academic institution with a degree program comparable to that of the candidate's department. It is desirable for reviewers to come from institutions that have similar research expectations and norms as the University of Missouri (e.g., other AAU and/or research-intensive institutions).
    e. Is able to provide an unbiased review. Reviewers who might reasonably be viewed as biased should not be nominated; this likely includes, but is not limited to, advisors, mentors, former classmates, and former colleagues at MU or at other universities.
2. From non-academic institutions or organizations (equivalent peer), the reviewer must be:

    a. Outside of the UM System
    b. An expert (preferably with a doctorate) of documented state or national stature in a field closely associated with the candidate's work
    c. Affiliated with a reputable non-academic institution or organization with a mission pertinent to the candidate's work
    d. Able to comment upon the impact of the candidate's work in the field
    e. Able to provide an unbiased review. Reviewers who might reasonably be viewed as biased should not be nominated; this likely includes, but is not limited to, advisors, mentors, former classmates, and former colleagues at MU or at other universities.

Criteria for partner, collaborator, or stakeholder reviewer:
1. Must be from outside of the UM System
2. Must have worked, observed, or collaborated with the candidate in the performance of their duties during the time-period covered by the case packet
3. Must be able to comment upon the impact of the candidate's work in the field
4. Must be able to provide an unbiased review. Reviewers who might reasonably be viewed as biased should not be nominated; this likely includes, but is not limited to, advisors, mentors, former classmates, and former colleagues at MU or at other universities.

NOTE:
Recommendations pertaining to Covid-19 and a candidate's packet:
1. *Reviewers should consider the impact of COVID-19 when considering any teaching evaluations for Spring 2020. Given the mid-semester transition to online, the faculty member applying for promotion and/or tenure can decide if they will include evaluations for Spring 2020 in their packet.*
2. *Reviewers at every level should consider the impact of COVID-19 on any dips in research production that occurred during and after the event.*
3. *Reviewers at every level should consider the impact of COVID-19 on any dips in service that occurred during and after the event.*
4. *Letters to external reviewers should request that they consider the events surrounding COVID-19 when reviewing a candidate's materials.*

Process for Nominating and Selecting External Reviewers

1. Candidate submits one document to their primary supervisor that contains 3 sections:
    a. Section 1: List of mentors and other individuals who would have difficulty writing an objective review as an external reviewer
    b. Section 2: List of potential external reviewers (academic, equivalent peer) with the names of their institutions and email addresses (for candidates applying for Extension Professional)
    c. Section 3: List of potential collaborator, stakeholder, or partner reviewers with the names of their institutions and email addresses
2. Primary supervisor also makes a list of potential external and/or partner/collaborator/stakeholder reviewers.
3. Candidate and primary supervisor meet to discuss nominations.

4. Primary supervisor selects final list of nominations. For candidates applying for Extension Professional, approximately half of the nominations for reviewers should be selected from the candidate's list and half from the primary supervisor's list, if possible. More than eight nominees may be selected as potential reviewers and prioritized so that they can be contacted if any nominees decline to serve.
5. Primary supervisor is responsible for confirming that all selected reviewers meet the criteria to serve as a reviewer. It is critical that the case packet contains letters only from qualifying reviewers.
6. Primary supervisor contacts selected reviewers, by email, to verify their availability and willingness to provide a review. See Appendix C for suggested wording.
7. Primary supervisor is repsonsbile for obtaining CVs, or resumes if applicable, from all reviewers who accepted request and will complete a biography on each reviewer. See Appendix F for a sample biography. An explanation of why the reviewer was chosen must be included.
8. Primary supervisor is responsible for keeping the above nomination lists, all email correspondence with potential reviewers, and reviewer CVs or resumes on file in their office.
9. Primary supervisor fills out "External Reviewer Nominations and Selections" spreadsheet, located on [Extension NTT webpage](#), and emails to Kim Shettlesworth.
10. Kim Shettlesworth sends a formal follow-up letter and candidate materials to external reviewers who agreed to provide a letter, sends deadline reminders, and follows up with reviewers who are late with submissions.
    Formal letter to external reviewer must include:
    a. The candidate's percent effort in each mission for the most recent academic year
    b. A request for the reviewer to state whether and how they know the candidate and if they know the candidate, the reason(s) they can provide an objective review
    c. A request for comments on
        i.   The potential for future productivity
        ii. The extent of development of a national/international reputation

Request for Corrections and Reconsideration

Candidates may request, within 5 working days, corrections of factual errors of the recommendation letters. The request for corrections will be sent via email by the candidate to the recommending person or body. Documentation that the email was sent and received will be kept on file by the candidate. Requested corrections will be made by the recommending person or chair of the recommending body, if agreed. The corrected recommendation letter is then to be replaced in the case packet. If the recommending body and candidate do not agree on the corrections, and corrections were not made, the candidate's letter explaining concerns will be placed in the case packet following the original recommendation letter. If the corrections are not requested and made until after the next level review, the correction will need to be saved as an addendum to the original letter, with the correction(s) highlighted in yellow. This addendum letter is shared with the candidate, using the share function in RPT, as well as with the designated person assisting with case packet processing at the current level of review. That person will confirm the added addendum to the case packet before forwarding the case to the next level of review. That person will notify the candidate by email that the addendum with the correction has been added.

Candidates may request reconsideration of a negative recommendation at any of the possible levels of review. Upon receipt of a negative recommendation letter, the candidate will email the reviewer or reviewing body to state *whether or not* they request reconsideration within five working days of received recommendation. If a negative recommendation is made but the candidate does not respond, it will be considered that the candidate is declining reconsideration. The reviewer or reviewing body will include information in their final recommendation letter that the candidate was offered, but declined reconsideration, either by reply or lack of reply. If a candidate does request reconsideration, the original recommendation letter at that level of review will be updated after the reconsideration meeting to include the reconsideration findings and final recommendation as a separate, new section of the letter. A candidate will be notified via email of the outcome of a reconsideration hearing with a copy of the updated and final recommendation letter.

Regardless of the recommendation at any point in the process, the case packet will move forward to the next level unless the faculty member wishes to withdraw from the process. If the faculty member wishes to withdraw from the process, a written statement of withdrawal should be provided to the Office of the Provost (c/o Brenda Cook at cookbj@missouri.edu), the primary supervisor, and the Vice Chancellor for Extension and Engagement (c/o Kim Shettlesworth at shettlesworthk@missoui.edu). Any materials used in the hearing process should be included in the section for that level of review. Copies of written documents presented at reconsideration hearings will be included in the packet and shared with the Vice Chancellor for Extension and Engagement.

A standard reconsideration (appeal) process and format will be followed at each level of review where reconsideration is requested. See request for reconsideration hearing format below.

Hearing format

Hearings will follow this format at all levels of review. This format information will be shared with the individual or group whose recommendation the candidate is requesting be reconsidered, as well as with the candidate. When the candidate is notified of a negative recommendation, instructions will be provided that include a deadline to respond either "yes" or "no" to reconsideration. If there is no response by the deadline it will be considered a "no." A deadline must also be communicated to the candidate on submitting rebuttal materials, along with instructions on providing names and MU affiliations of any advocates (no more than three) the candidate may bring to the hearing, if applicable. Additional materials and advocate information, if applicable, will be provided by the candidate via email to the reviewer who sent the recommendation letter, and shared with the committee at least three business days before a reconsideration hearing. The below hearing format will apply at all levels of review, whether with an individual reviewer or a committee.

1. Hearings will be scheduled for one hour, with additional time allowed if needed. Room scheduling should allow for more than the one hour.
2. The committee will assemble in the assigned room and briefly prepare for the hearing
3. Candidate and advocates will be welcomed to the hearing by the committee chair or equivalent for that particular level of review
4. Members of the committee will briefly introduce themselves, if necessary
5. Candidate will introduce themselves and any advocates to the committee
6. Candidate and advocates will be allowed a maximum total time of 30 minutes to discuss issues raised in the recommendation letter from the committee. Candidates should plan

their 20-30 minutes in a way to best present their case, noting that advocate speaking time shortens their own presentation time. Members of the committee may ask follow-up questions of the candidate and advocates. During this period, the candidate may be excused to allow confidential questions to be asked of the advocates.

7. The candidate and advocates will then be dismissed, and the remaining time used for committee discussion
8. The candidate will be informed of the outcome of the hearing as soon as it is available by email correspondence from the committee chair

Upcoming Changes for the 2025-2026 Promotion Cycle

1. The submission deadline for candidate case packets will be August 31, which is a month earlier than the 2024-2025 deadline. This is to allow adequate time for required procedures at all levels of review, both current and forthcoming in the next cycle.
2. The first level of review will be that of the candidate's programmatic peers who are at the promotable rank or above of the candidate. Peers will provide anonymous comments regarding the candidate's contribution to Extension.

Appendices

Appendix A.1 – Summary of Accomplishments 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. 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 of 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	• Integrated, collaborative and interdisciplinary delivery of presentations, lessons, courses, curriculum and programs online, onsite or in person • A narrative expanding on the Instructional 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 • 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 **Extension & Engagement Specialists** • Delivery of presentation, lessons, courses, curriculum and programs for your counties • Training of extension councils

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 • 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. **Extension & 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

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 RII 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 • 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 **Extension & 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 – Professional Service Achievements 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. 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 • Whatever is included in responding to these criteria should be documented in your CV.	

Appendix A.2 – Summary of Accomplishments 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*. 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 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	Integrated, collaborative and interdisciplinary delivery of presentations, lessons, courses, curriculum and programs online, onsite or in person • A narrative expanding on the Instructional 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 • 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 **Extension & Engagement Specialists** • Delivery of presentations, lessons, courses, curriculum and programs for your triad counties • Training of extension councils

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 • 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. **Extension & 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 RII 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

Criteria	Examples of Evidence, Documentation and Content Guidance	Documentation and Content Guidance by Job Title
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 • 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 **Extension & 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 -- Professional Service Achievements 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*. 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	
	• Whatever is included in responding to these criteria should be documented in your CV.	

Appendix B

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 C

Dear_____:

(Name), 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.   If you have been a mentor, or friend of this candidate, please contact me before agreeing to do the review.

If you agree to provide a review, you will receive access, via email, to the candidate's materials, as well as specific review guidance no later than October 4, 2024. Your review letter will be due November 15, 2024.

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 are available to undertake this review.

Sincerely,

Primary Supervisor
Phone number
Email address

(Note: If reviewer agrees to provide a review, primary supervisor must obtain a CV or resume from reviewer to keep on file)

Appendix D

Follow-up letter for requesting a review of candidate's case
packet by the external peers (academic or equivalent peer)
Kim Shettlesworth sends this email via RPT

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 process requires that candidates provide evidence of their performance in the three core duties 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 D

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,

Appendix E

Follow-up letter for requesting a review of a candidate by a
stakeholder/partner/collaborator
Kim Shettlesworth sends this email via RPT

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 an Extension faculty member. 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,

Appendix F

Example of Reviewer Biographies (academic, peer-equivalent, & partner/collaborator/stakeholder)

Below is an example of Reviewer Biographies. Primary supervisor will provide biographies for all external reviewers who AGREED to provide letter of recommendation. List in alphabetical order by reviewers' last name. Bios must include:

- *Particular qualifications of the reviewer that were the reasons for their selection, in relation to candidate's work.*
- *Justification for selecting a reviewer who did not meet one or more of the criteria*
- *Whether/how the reviewer knows the candidate (based on the reviewer's report)*
- *For academic reviewers, current position, rank, and academic affiliation are required.*

External Review Biographies for ___(Candidate's Name)___

I, (primary supervisor name), candidate's primary supervisor, selected the below external reviewers, ensuring all reviewers meet the criteria as listed in the Extension NTT Promotion Guidelines. I selected these reviewers from lists of nominations provided by both the candidate and myself. A record of these lists is housed in my office.

The below list is notable for the quality and expertise of the individuals in the areas of (list relevant subject areas) and their objective relation to the candidate. If a reviewer knows the candidate, an explanation of the relationship to the candidate and why the reviewer was chosen is provided.

The below comments have been assembled from notes supplied by the candidate, from discussions with the candidate, and with consultation from sources such as _____ (example: *Who's Who in America, Who's Who in Metaphysical Engineering and American Men and Women in Science*)

(Note: List in alphabetical order by reviewer's last name. MUST include reviewer's current position, rank, and academic affiliation, the particular)

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......

ALL PDFs submitted in your case packet must be free of bookmarks. Below are instructions on how to tell if your PDF has bookmarks, and how to remove the bookmarks if they do.

In Adobe Acrobat Pro—Click on the Bookmarks tab on the left. This will show you a list of all bookmarks in the PDF. You'll need to delete all of the bookmarks by selecting them and clicking the "trash" icon.   Example below:
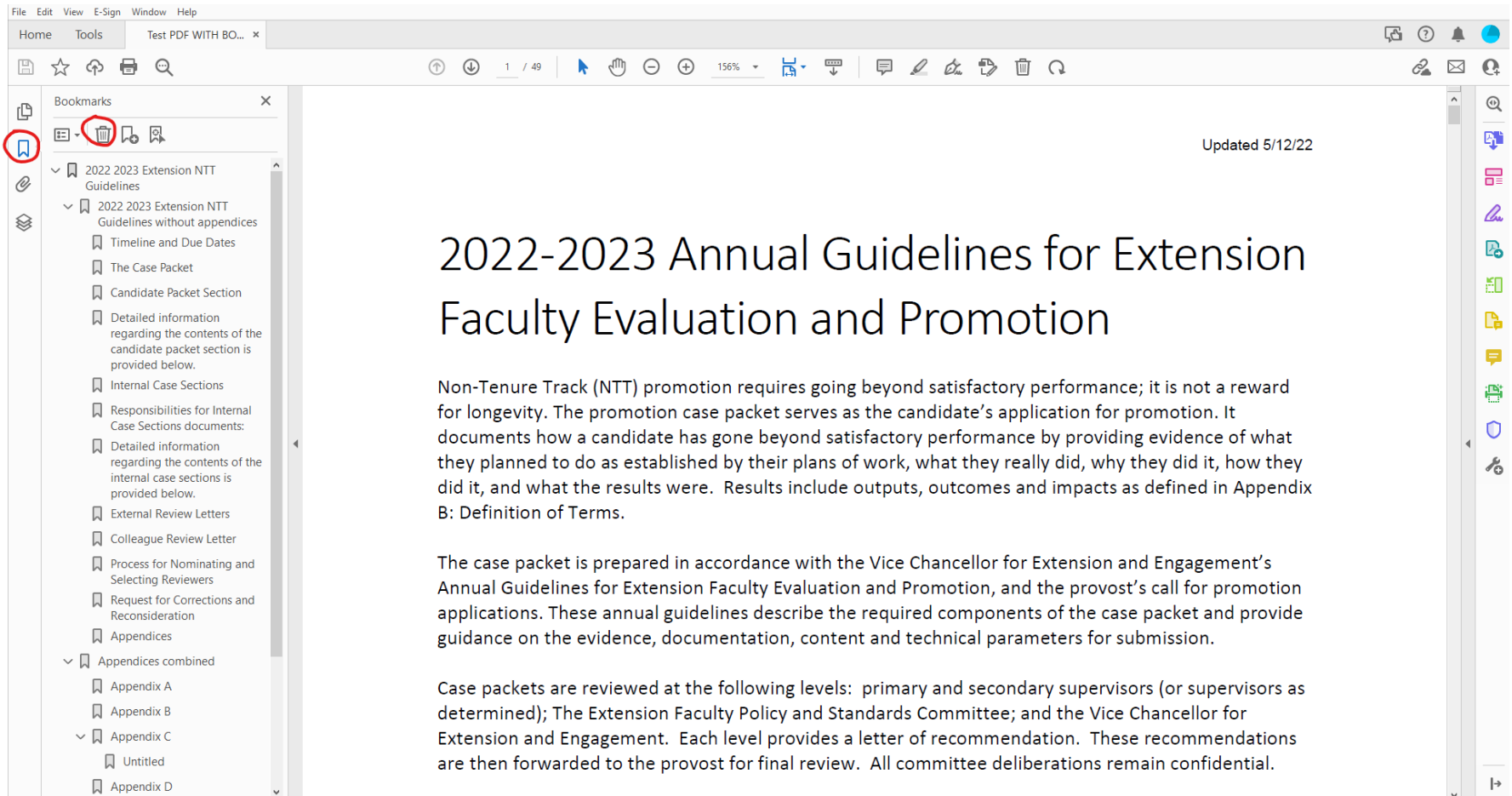
Once you've removed all bookmarks, you will no longer see any listed in the bookmarks tab: (image below)

Appendix G

2022-2023 Annual Guidelines for Extension Faculty Evaluation and Promotion

Non-Tenure Track (NTT) promotion requires going beyond satisfactory performance; it is not a reward for longevity. The promotion case packet 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 B: Definition of Terms.

The case packet 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 case packet and provide guidance on the evidence, documentation, content and technical parameters for submission.

Case packets are reviewed at the following levels: primary and secondary supervisors (or supervisors as determined); The Extension Faculty Policy and Standards Committee; and the Vice Chancellor for Extension and Engagement. Each level provides a letter of recommendation. These recommendations are then forwarded to the provost for final review. All committee deliberations remain confidential.