2024-25 FACULTY SUCCESS GUIDE

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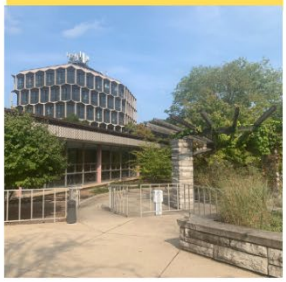

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Introduction to Faculty Success

Faculty Success is a tool that allows you to document your professional activities and accomplishments anytime, ensuring your portfolio is always up-to-date. You don't need to wait for specific templates to be made available — you can continuously update your records throughout the year.

Documenting Activities and Uploading DACs

In Faculty Success, you will fill out forms to record your activities and upload supporting documentation. The system automatically generates a record of each activity. Some departments may require different organizational structures (Department Application of Criteria, or DAC), but as long as all your activities are documented, the system will accommodate these variations.

Department Application of Criteria (DAC) documents will be uploaded by Faculty Success Administrators and linked directly in your annual activity report. Department committees and chairs will be informed of this universal setup and any differences from your department's specific DAC.

Course Evaluations and Pre-Loaded Data

Courses will be pre-loaded into Faculty Success approximately four weeks after the semester begins. For course evaluations:

- **Fall 2020 to Present**: Evaluations will automatically be uploaded 4-7 days after grades are posted.
- **Prior to Fall 2020**: You will need to manually upload evaluations based on files you have retained from using SmartEvals. (check with your department or program assistant)

Automatic Linking and Reporting

The system will generate necessary links and citations for you, so you don't need to manually link anything. Tables and citations will also be automatically generated based on the information entered in your activity forms.

The culmination of all your documented activities in Faculty Success will result in an automatically generated Annual Activity Report. This report will be compiled by the Faculty Success Administrators using dates provided by Academic Affairs for the relevant years of your portfolio.

Steps to Prepare Your Portfolio

1. **Regularly Update Activities**: Continuously enter your professional accomplishments and activities into Faculty Success.
2. **Prepare Your Narrative**: Use external tools like Google Docs or Microsoft Word to draft your narrative, then paste it into the RPT module when available.
3. **Upload Course Evaluations**: Check that your course evaluations are up-to-date and manually upload any evaluations prior to Fall 2020.
4. **Meet DAC Requirements**: Ensure that your documentation aligns with your department's Application of Criteria (DAC) for a successful portfolio review.

What Semesters Are Included in My ePortfolio?

The Annual Activity Report will be auto-generated for you based on the dates provided to the Faculty Success Administrators by Academic Affairs. As a general guideline, the semesters included in your portfolio depend on your current review year.

Year One Portfolio

- **Semesters Included**: Fall 2024
- **Note**: In your first year, your portfolio only includes one semester — Fall 2024.

Year Two Portfolio

- **Semesters Included**: Fall 2023, Spring 2024, Summer 2024 (if applicable), Fall 2024
- **Note**: For Year Two, your portfolio covers three semesters.

Years Three, Four, and Five Portfolios

- **Semesters Included**: Spring 2024 through Fall 2024
- **Note**: From Year Three onward (until tenure review), your portfolio includes the full calendar year, beginning in Spring 2024 and ending in Fall 2024.

Tenure/Associate Professor Portfolio

- **Semesters Included**: All evaluation periods from Years 1-6 or based on your eligibility if you bring your previous experience.

- **Note**: For your tenure or associate professor portfolio, you must include all evaluation periods from Years One through Six, ensuring a comprehensive review.

Changes to Your Portfolio After Submission to the DPC

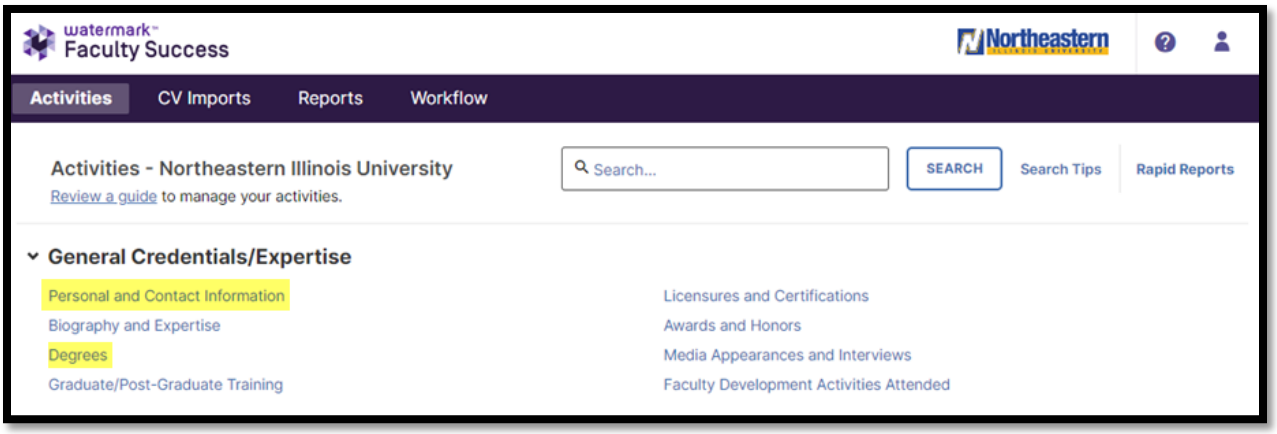
Once the evaluation process has begun, your Department Personnel Committee (DPC) may request that you add or edit parts of your portfolio. If changes are needed, the process involves the following steps:

1. **Request for Changes**:
    - Within the RPT module, your DPC can request changes to your portfolio.
    - These requests are submitted through Faculty Success, and then must first be approved by Effie Kritikos (University Contract Administrator) and Brandon Bisbey (UPI President).
2. **Approval Process**:
    - Faculty Success will notify you via automated messages of the decision made by Effie and Brandon regarding the requested changes.
    - The message will also include a time frame for making the necessary changes.
3. **Resubmission**:
    - Make sure you update your narrative and refresh the Annual Activity Report. Once the requested changes have been made, simply resubmit your portfolio.
    - Your DPC will review it again before it moves on to the department chairperson for further evaluation.
4. **Future Change Requests**:
    - Any subsequent requests for changes, after the DPC review, must also be approved by Effie Kritikos. This approval process is integrated into the RPT module.
    - The conditions for adding new materials to the evaluation process are outlined in Article 25.04.D.3 of the UPI Contract.

General Credentials/Expertise

In this section of your portfolio, you should:

1. **Verify and Complete Your Information**:
    - Ensure your **Personal and Contact Information** is accurate and up to date.
    - Verify and update the **Degrees** section to reflect your educational credentials.
2. **Document Other Activities (as applicable)**:
    - You can complete other sections within this area as needed to document relevant professional activities or additional qualifications.



Career Information

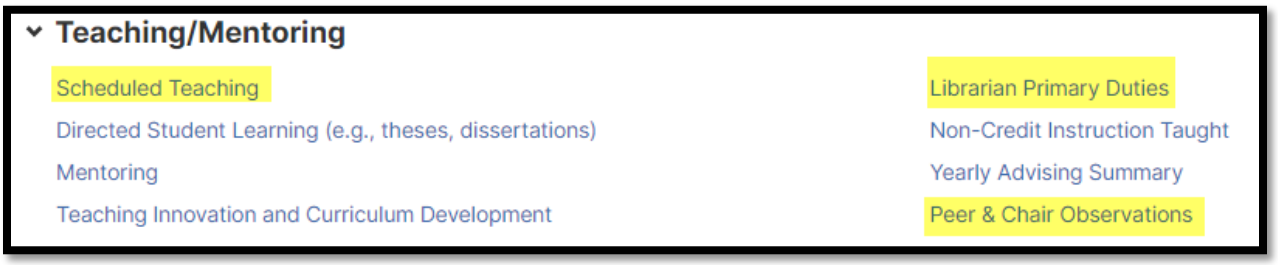
In this section of your portfolio:

1. **Administrative Assignments**:
    - If you have served as a **chairperson** or held any other **non-teaching Form D assignment**, these should be documented under **Administrative Assignments**.
2. **Additional Sections**:
    - You can complete other sections within this area as necessary to document relevant career-related activities or roles.

Teaching/Mentoring

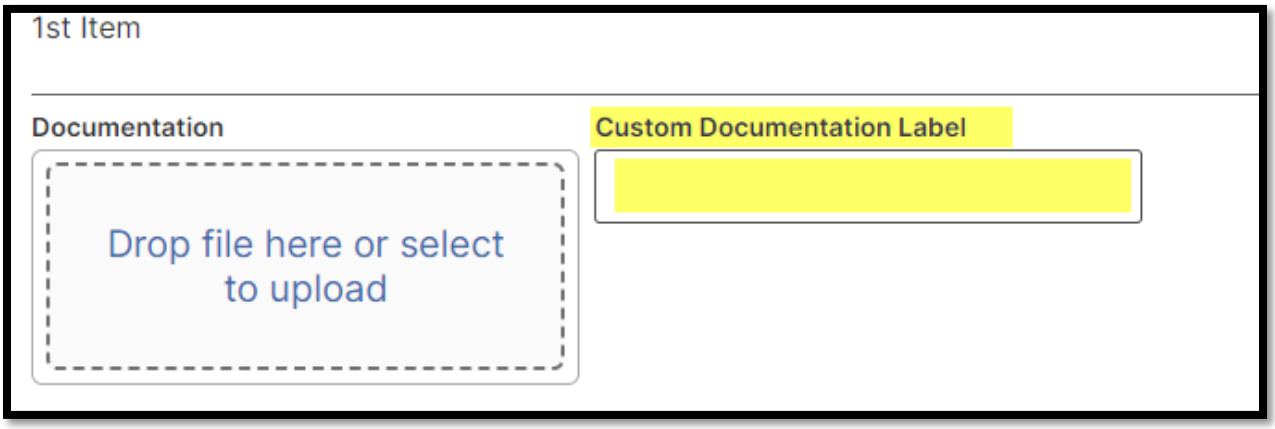
In this section of your portfolio, you will need to:

1. **Complete Required Sections**:
    - Fill out the **Scheduled Teaching** section (or **Librarian Primary Duties**, if applicable).
    - Upload documents to the **Peer and Chair Observations** section.



2. **Upload Course Materials**:
    - Ensure each of your courses includes the following:
        - **Syllabi**
        - **Instructional Materials**
        - **Evidence of Instructional Technology**
    - You can upload multiple files or web addresses, but all will be labeled either **Instructional Materials** or **Instructional Technology** depending on where they are uploaded.
3. **Custom Documentation Label**:
    - By default, uploaded materials will be labeled "Instructional Materials" or "Instructional Technology."

- If you want specific labels to display for your reviewers (e.g., Lecture PowerPoint, Midterm Exam, Discussion Prompt), complete the **Custom Documentation Label** field.
- This option is available throughout Faculty Success, including the **Research** and **Service** sections.



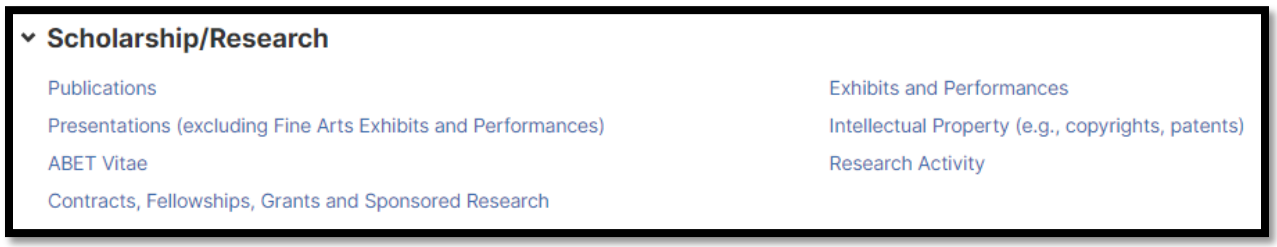
4. **Document Additional Activities**:
   - You can document other activities under the appropriate links:
     - **Directed Student Learning** (e.g., theses, dissertations)
     - **Mentoring**
     - **Teaching Innovation and Curriculum Development**
     - **Non-Credit Instruction**
5. **Student Advising**:
   - If you assist with student advising, document these details within your **Teaching** or **Service** narrative, as required by your DAC or Form D.

Scholarship/Research

In this section of your portfolio, you will likely include your **presentations** and **publications**. You can document both **in-progress** and **completed** work.

Key Points to Remember:

- In your **narrative**, be sure to mention any specific requirements outlined in your DAC (Department Application of Criteria). For example, if your DAC specifies that you need a certain number of **Category 1** or **Category 2** items, be sure to include that information in your narrative.
- The detailed information and documentation for your presentations and publications will be automatically included in your **Annual Activity Report**.



- **Research Publication**
  - Books
  - Book Chapters
  - Book Review
  - Case
  - Conference Proceeding
  - Instructional Material
  - Journal Article
  - Magazine/Trade Publication
  - Newsletter
  - Newspaper Article
  - Reference Article
  - Software
  - Technical Report
  - Textbook
  - Other
- **Presentations (excluding Fine Arts Exhibits and Performances)**
  - Demonstration
  - Exhibit
  - Keynote/Plenary Address
  - Lecture
  - Oral Presentation
  - Paper
  - Poster
  - Others

  **Presentations include the scopes of:*
  - International
  - National
  - Regional
  - State
  - Local
- **Exhibits and Performances**
  - Artist in Residence
  - Dance Performance
  - Exhibition
  - Film
  - Film Screening
  - Music Performance
  - Production
  - Radio
  - Television
  - Theatre Performance
  - Other
- **Contracts, Fellowships, Grants, Sponsored Research**
  - Contract
  - Fellowship
  - Grant
  - Sponsored Research

  **These can be awarded at the following levels:*
  - Northeastern Illinois University
  - Local
  - State
  - Federal
  - Private
  - Other

Service

In this section of your portfolio, you can document your service to

NEIU	Professional	Public
Department College University	Adjudicator Attendee, Meeting Board of Advisors Board of Directors Chairperson Committee Chair Committee Member Conference-Related Editor Editorial Review Board Member Interaction with Industry Officer Prepare/Grade Certification Exams President Program Coordinator Program Organizer Reviewer/Referee Secretary Session Chair Task Force Chair Task Force Member Track Organizer Treasurer Vice President Workshop Organizer Other	Adjudicator Board Member Board of Directors Chair Committee Member Guest Speaker Judge Member Organizer Participant President Volunteer Other

AACSB Societal Impact Designations

This section only pertains to faculty who teach in the CBT and belong the accounting, business law, finance, marketing, and management departments.

A new AACSB accreditation requirement is to report is how many courses, publications or presentations impact society. For each of these activity types starting with the Fall 2023 you must tag/associate these activities (if appropriate) with the appropriate impact measures.

There are currently 17 possible societal impact measures based on the United Nations Sustainable Development Goals.

- No poverty
- Zero hunger
- Good health and well-being
- Quality education
- Gender equality
- Clear water and sanitation
- Affordable and clean energy
- Decent work and economic growth
- Industry, innovation and infrastructure
- Reduced inequalities
- Sustainable cities and communities
- Responsible consumption and production
- Climate action
- Life below water
- Life on land
- Peace, justice and strong institutions
- Partnerships

When you are documenting an activity, you will have a box similar to the one below that will allow you check one or more societal impact measures to associate with that particular activity.

Writing Your Narratives for Faculty Evaluation

Introduction

As part of your faculty evaluation portfolio, you are required to write three narratives: teaching, research, and service. These narratives are crucial components of your portfolio, providing you with an opportunity to highlight your achievements and contributions in each area. This guide will help you navigate the process of writing and submitting your narratives.

Accessing Your Narrative Forms

You have two options for accessing your narrative forms:

Option 1: Email Notification

You will receive an email notification when it's time to complete your narratives. The email will contain a direct link to access the forms.

Option 2: Workflows Menu

Alternatively, you can access your narratives through the Workflows menu:

1. Click on the **Workflows** menu button.
2. In the **Inbox**, locate the item for your specific evaluation (e.g., "Retention Portfolio" or "Promotion – [Your last name]").
3. Click on the relevant item to open your narrative forms.

Writing Your Narratives

Once you've accessed the forms, you'll see three text boxes, one for each narrative:

1. Teaching Narrative
2. Research Narrative
3. Service Narrative

Guidelines for Each Narrative

Teaching Narrative

- Discuss your teaching philosophy
- Highlight innovative teaching methods you've implemented
- Provide examples of student success and engagement
- Include any teaching awards or recognition

Research Narrative

- Summarize your research focus and goals
- List significant publications, presentations, or creative works
- Describe any grants or funding you've secured
- Explain the impact of your research in your field

Service Narrative

- Detail your service to the department, college, and university
- Describe any community or professional service activities
- Highlight leadership roles in committees or organizations
- Explain how your service contributes to your professional growth and the institution's mission

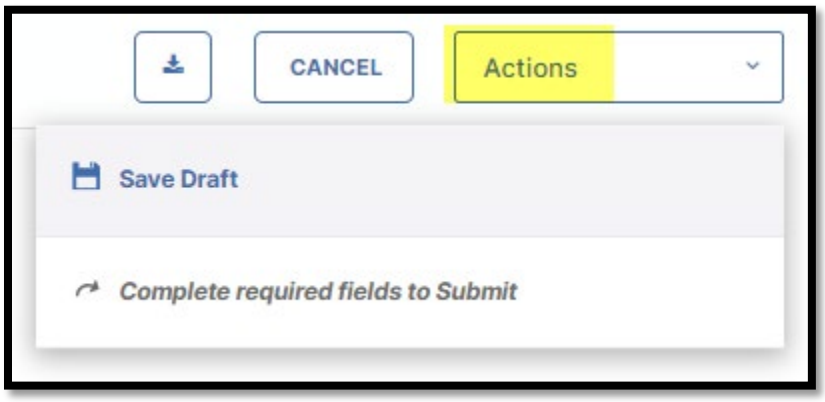
Formatting Guidelines

- Use clear, concise language
- Stick to the word limit (if applicable): [Insert word limit here]
- Use subheadings to organize your content
- Proofread carefully for grammar and clarity

Submission Process

1. Complete all three narratives in the provided text boxes.
2. Review your entries for completeness and accuracy.
3. Refresh your annual activity report by clicking Refresh button as shown in the picture above.

4. Click on Actions in the Upper Right Corner, select Submit to Departmental Personnel Committee.



Saving and Submitting Your Narratives

Saving Your Work

- In the upper right corner of the page, you'll find an Actions button.
- To save your work in progress, click on Actions and select Save Draft.
- You can save your draft at any time and return to it later.
- We recommend saving your work frequently to prevent loss of progress.

Completing Your Narratives

- The system will not allow you to submit until all required sections are completed.
- Review each narrative carefully to ensure all information is accurate and complete.

Submission Process

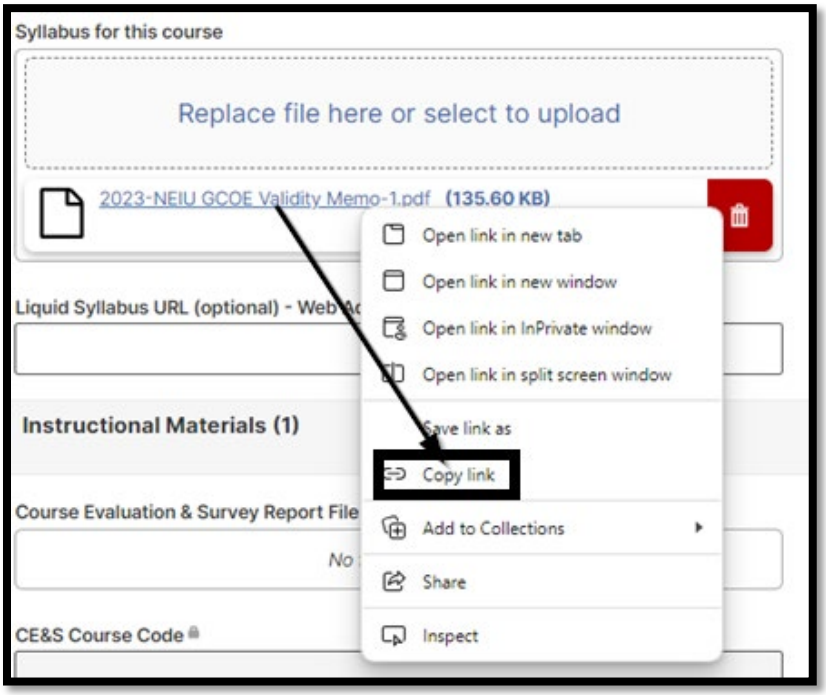
1. Once all narratives are complete, return to the Actions button in the upper right corner.
2. If all requirements are met, you'll see an option to "Submit to [Next Stage]".
    - In the first stage, this will typically say "Submit to Department Personnel Committee".
3. Click this button to submit your completed narratives.
4. You will receive a confirmation email once your narratives have been successfully submitted.

Inserting Links into Narratives

If you want to reference an item you've uploaded in the **Activities** section, you can insert a link into your narrative by following these steps:

Part I: Copying the Link

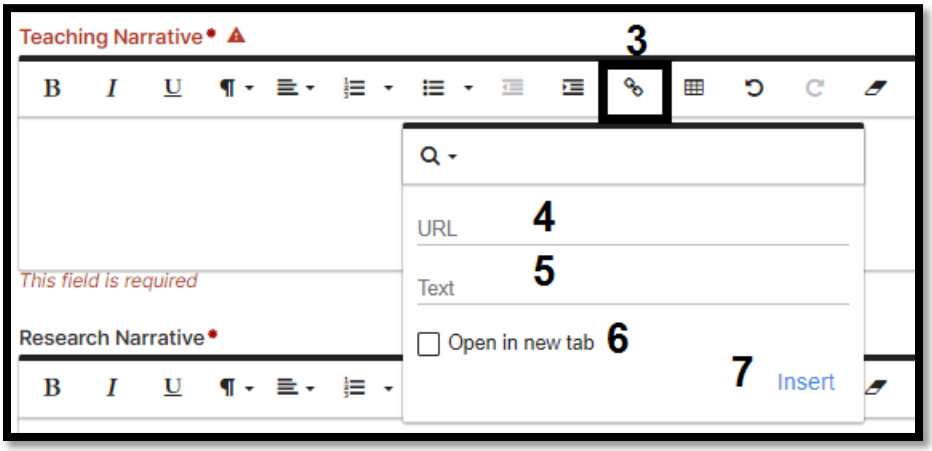
1. Go to the **Activities** area.
2. Find the item you want to reference.
3. Right-click (or secondary/cmd click) on the item and select **Copy Link**.



Part II: Inserting the Link into Your Narrative

1. Go to **Workflows**.
2. Click on the task, e.g., **Retention Portfolio**.
3. In the HTML toolbar, click **Insert Link**.
4. Paste the link copied in Part I.
5. Type the text you want to display for the link.
6. Select **Open in a new tab**.

7. Click **Insert**.

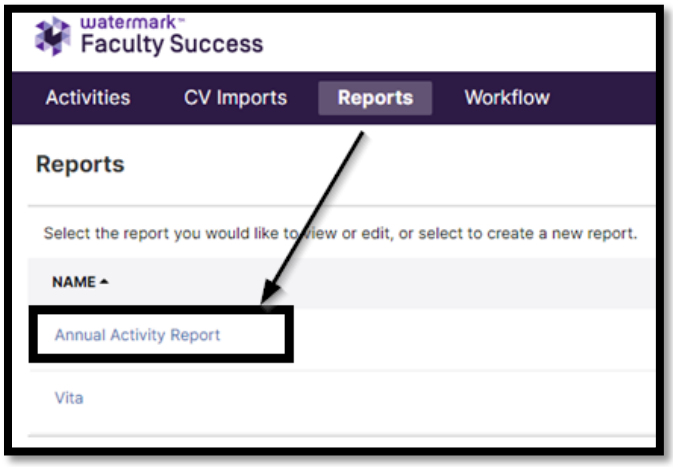


Previewing Your Annual Activity Report

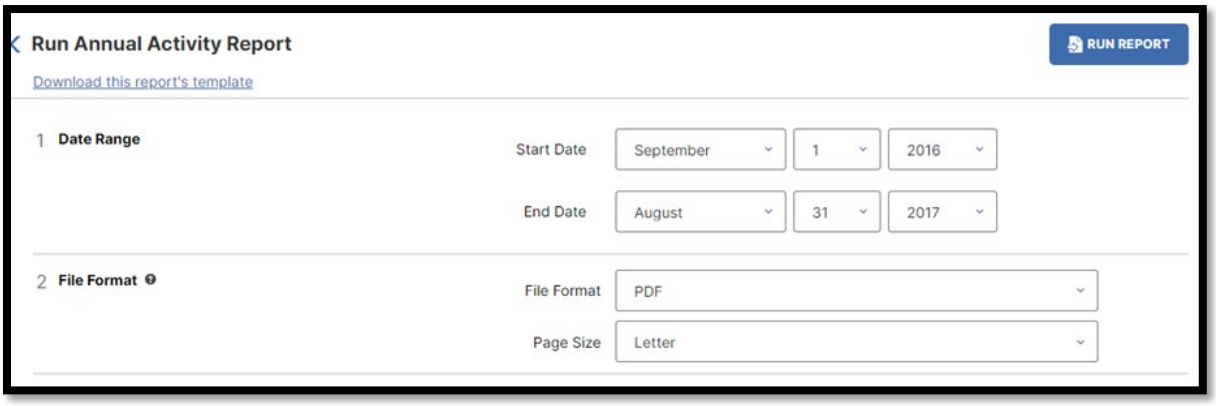
If you want to see how your Annual Activity Report will appear to reviewers, you can generate a preview by following these steps:

1. **Log into Faculty Success**.
2. Click on **Reports** in the horizontal navigation bar.

3. Select the **Annual Activity Report** link.



4. **Verify the Parameters**:
    - **Date Range**: Ensure the time frame matches the period for which you're being evaluated.
        - **Example**: For Year 2, select **September 1, 2022** to **December 31, 2023**.
    - **File Format**: Select **PDF** (Word format may not render links correctly and can cause errors).

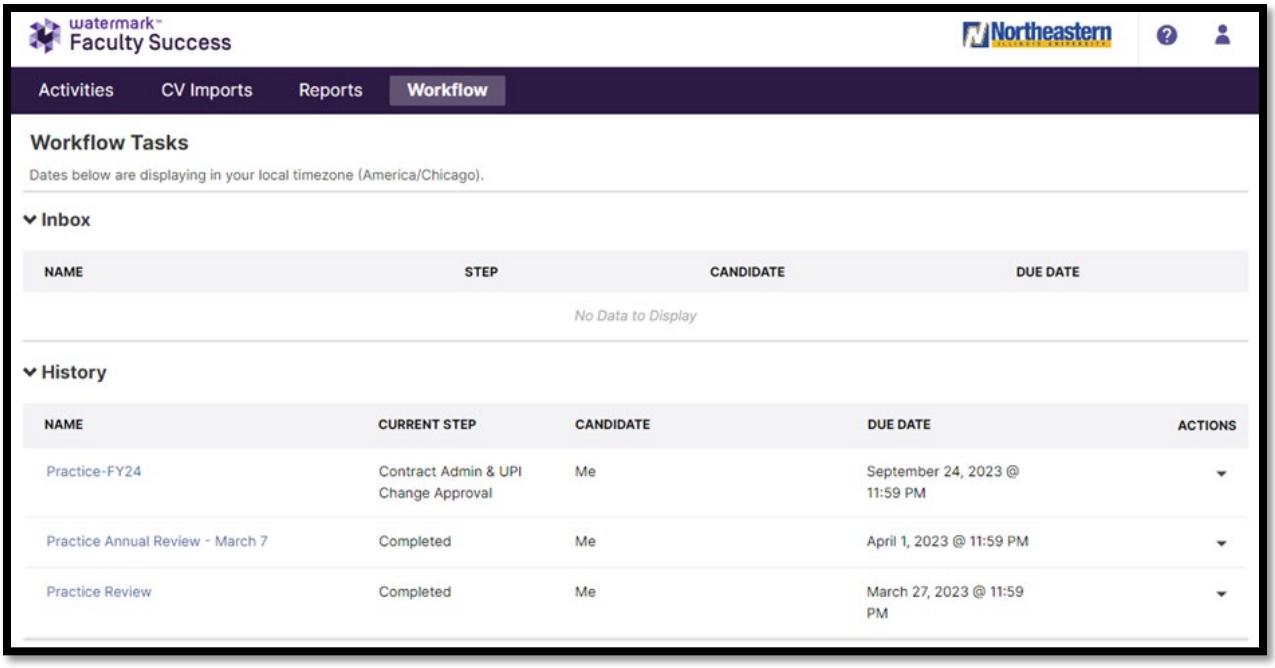


5. Click **Run Report** (upper right corner).
    - The report will be downloaded to your **Downloads** folder by default.

Monitoring Your Portfolio Progress

To track the progress of your portfolio, follow these steps:

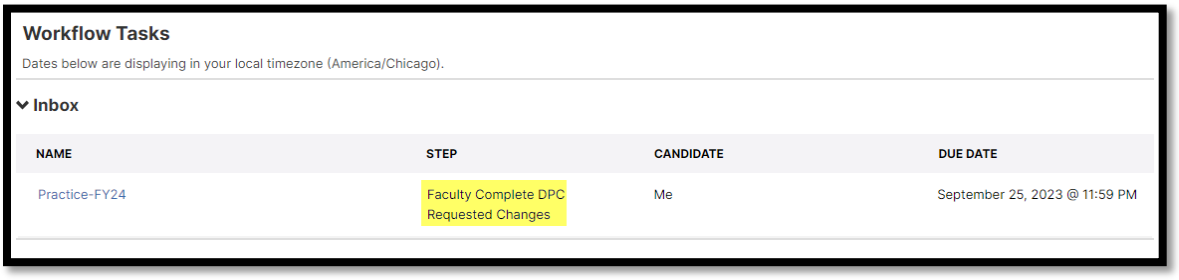
1. **Go to the Workflow Tab**:
    - This is where you can see the current status of your portfolio.
2. **Inbox**:
    - If an item appears in your **Inbox**, it means there is an active task for you, such as making changes based on a DPC request that has been approved by the Contract Administrator.
3. **History**:
    - Items listed under **History** will show the current stage of your portfolio in the review process, along with the due date for moving to the next stage.



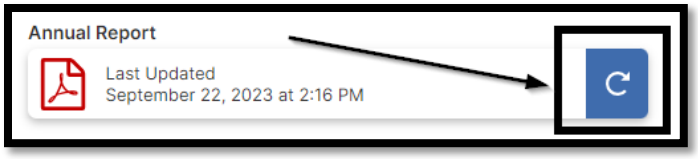
Making DPC Requested Changes

If the DPC (Department Personnel Committee) requests changes to your portfolio, follow these steps:

1. **Receive Notification**:
    - You will get an email to "Start Your Response" and see an alert in your **Faculty Success Workflow Inbox**. The task will be labeled **Faculty Complete DPC Requested Changes**.

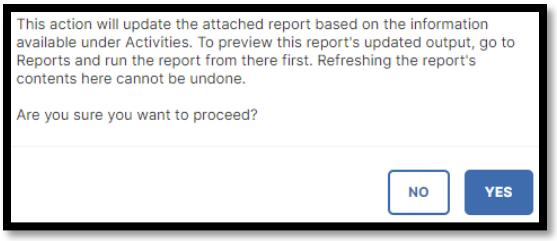


2. **Update Accomplishments and Activities**:



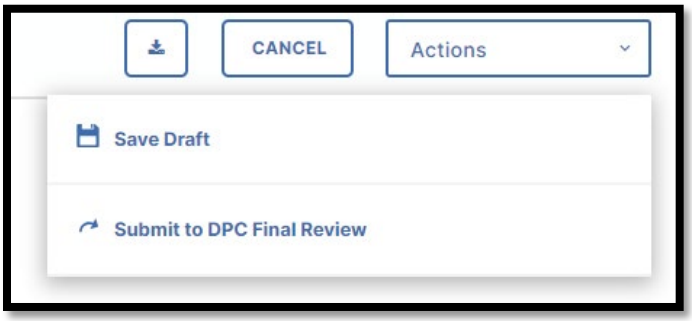
- If you make any changes in your **Accomplishments and Activities**, you must **refresh your Annual Report**:
  - Click the **Refresh** button.
  - A pop-up warning will appear:

This action will update the attached report based on the information available under Activities. To preview this report's updated output, go to Reports and run the report from there first. Refreshing the report's contents here cannot be undone.



- You will likely click **Yes** if you've made changes. Once refreshed, the time stamp will update.

3. **Update Narratives**:
   - If you need to update your narratives, copy and paste the revised text either from **Faculty Success** or from your original document (e.g., Microsoft Word or Google Docs).



4. **Submit for DPC Final Review**:
   - Once all changes are complete, click **Actions** and select **Submit for DPC Final Review**.
   - A confirmation pop-up will appear. Click **Yes** to proceed to the next stage of review.

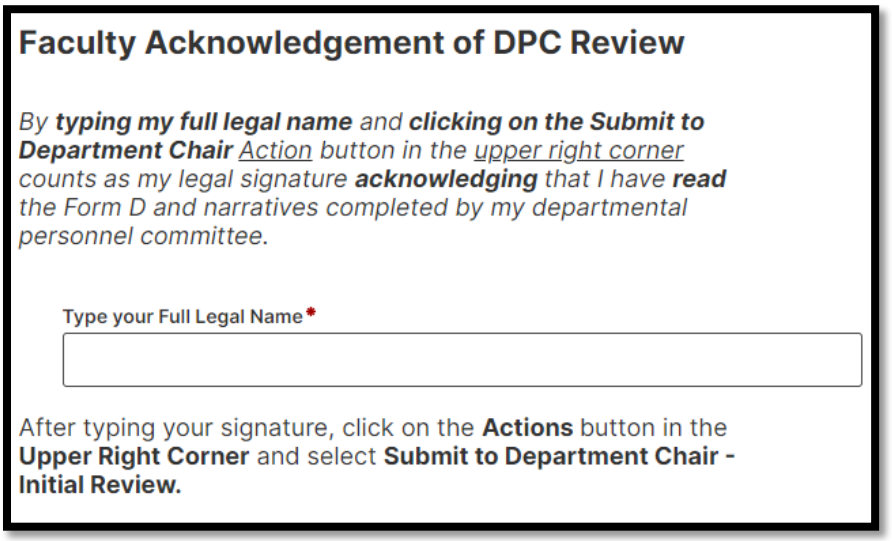
5. **Final Notes**:
   - This will likely be the last opportunity to make changes to your portfolio, as changes at later review stages are rare.

Acknowledging Reviewer Recommendations

At the end of each review stage, you are required to acknowledge that you have read the recommendation regarding your retention and/or promotion. This acknowledgment confirms you've read the form and/or letter but does **not** imply agreement with the recommendation.

Important Notes:

- Acknowledging means you have read the recommendation, not that you agree with it.
- You typically have the right to **appeal** a negative recommendation, but the first step is to acknowledge what the reviewer has stated.



Steps for Acknowledgment:

1. **Type your Full Legal Name** in the designated field to confirm you've read the review.
2. **Submit to the Next Stage**:
    - Go to **Actions** and select **Submit to Next Stage**.

A confirmation pop-up will appear. Click **Yes** to proceed to the next stage.