

# **Hands-On Workshop – Electronic Tenure, Promotion, and Reappointment Process 2021-22**

---

9/17/2021



**Michigan Tech**



# Notes

- This presentation is geared towards the administrative assistants who are new or somewhat new to assisting with the TPR process.
- Detailed steps are provided for the assistants but others should *not* use this as an overall guide.



# Documents

- The [\*Schedule of administrative deadlines\*](#)\* has important dates for faculty, supervisors, committees, and involved offices.
- Virtual Binder to be used will depend on the type of review.
  - T/P Binders (FVB & AVB) should be used for tenure and/or promotion reviews.
  - TT Binders (IVB & MVB) should be used for interim & major reviews.
  - NTT Binders (LVB & NVB) should be used for lecturer reviews & promotion as well as non-lecturer reviews.
- Navigation Document
  - A table of contents has been created in each binder. If this does not work, reviewers can use the navigation document to search for specific cover pages.
- Informational Sheet for the Board
  - New this year – a picture should not be included.
  - This document is located in the faculty binder (FVB).

---

\*See the “Important Dates and Deadlines” section here: <https://www.mtu.edu/hr/current/faculty/>



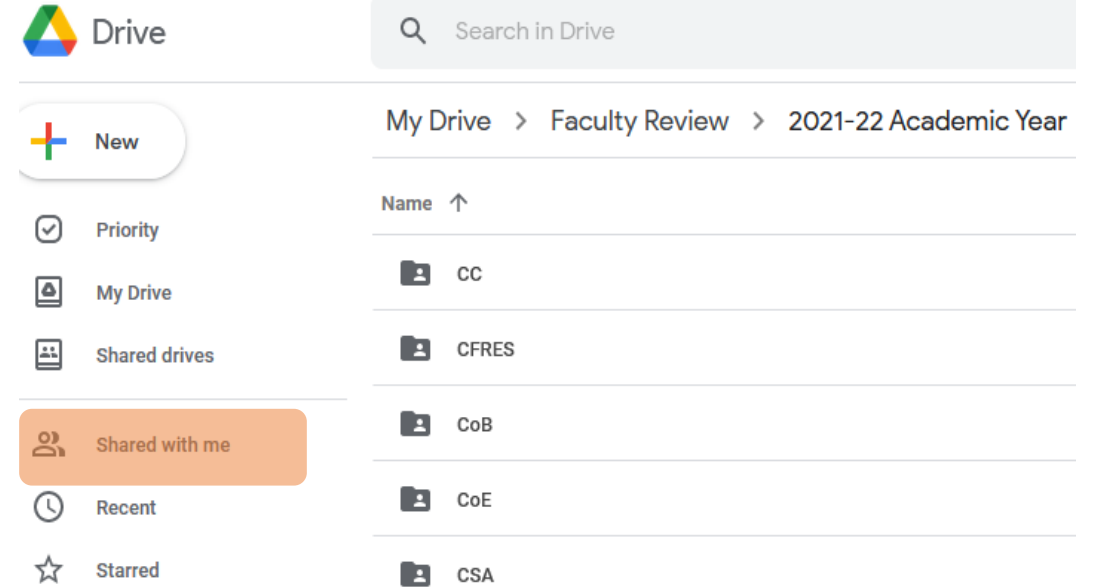
# Roles

- Assistants at each stage will have edit access to the appropriate Google folder(s).
  - Allows for uploading files and changing access to individual files.
  - Able to move individual dossiers along as they are ready for the next level of review.
- Committees, chairs, & deans will be given “view access” at the appropriate stages.
  - Will not be able to download, print, or copy binders.
  - View access will expire at set dates/times (see [schedule](#)).
- File ownership will be transferred to HR at specific points in the process.



# August

- Schedule of administrative deadlines, is set:
  - [posted online](#) under *Important Dates and Deadlines*
- HR created a Google folder for each college and department.
- A named departmental assistant provided edit access in order to:
  - upload the faculty member's virtual binder,
  - insert materials to respective sections of the virtual binders and upload dossier, and
  - change ownership of the files as noted.
- Mandatory tenure review notifications were sent.
- Faculty begin preparing materials for virtual binder.
  - Follow/complete Faculty Checklist [online](#) see *Promotion, Tenure and Review*



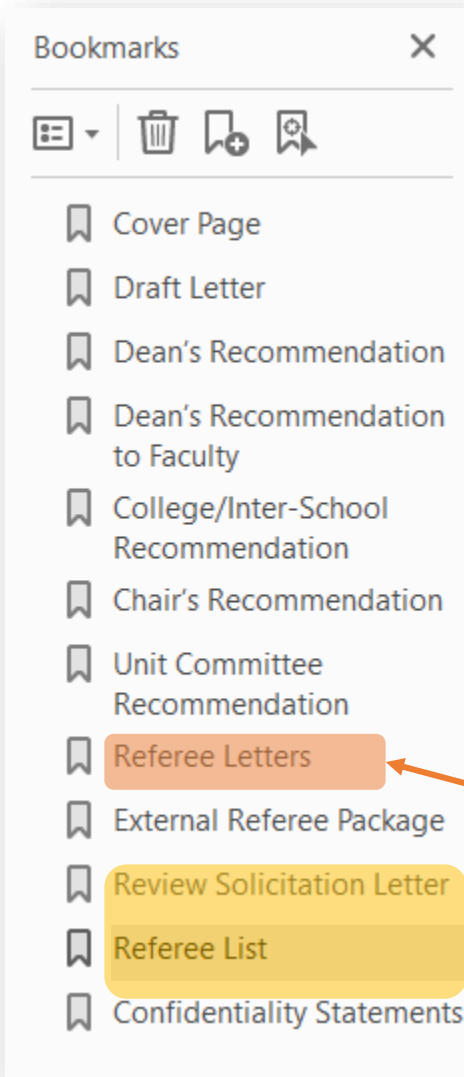
# September

Faculty being reviewed provide supervisor with:

- suggested external reviewers, and
- documents to be sent to external reviewers .

Supervisor shares documents with the unit's TPR committee so they can create a list of reviewers.

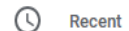
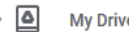
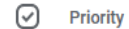
# October



- Unit sends external reviewers letter and documents.
- Referee response deadline: mid-Nov.
- You could begin building your administrative virtual binder by inserting the solicitation letter and referee list to the respective sections of the administrative binder.
- Similarly, as external letters are received, they can be added to the administrative binder for the respective candidate (*under "Referee Letters"*)

# November & December

- Faculty provides assistant with finalized virtual binder, who uploads and
  - disables downloading/printing/copying for each binder.
- Unit TPR committee sends their confidentiality statement, recommendation, and memo following review of T/P to appropriate assistant to add:
  - Confidentiality statement to unit's respective Google folder, and
  - Recommendation and memo to the respective binder.
- NOTE: After the due date (12/24/2021), the unit's committee will no longer have access to the folders/binders.
- Assistant prepares applicable forms:
  - Form A, C, C1, or Form L depending on the type of review
  - Form B for tenure and/or promotion review
  - Form E depending on the type of review
    - all forms will need to be digitally signed and uploaded to the respective binder
  - draft appointment letter (if applicable)



Search in Drive

My Drive > Faculty Review > 2021-22 Academic Year > TEST Folder

Name ↑

Department 1

Department 2

Reviews Complete - Ready for HR

Reviews Complete by Dean - Ready for Provost's Review

9/17/2021



Michigan Tech



# Forms

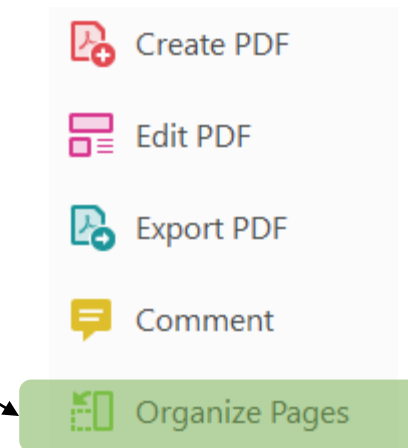
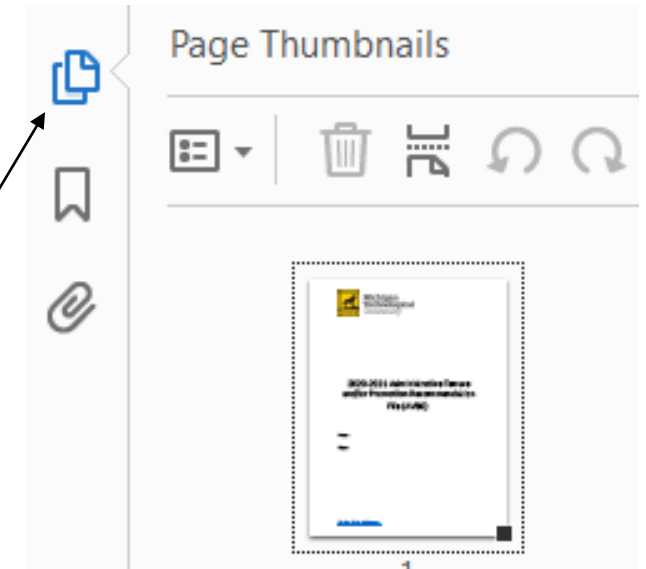
- Forms must be digitally signed.
- Due to Adobe limitations forms must be saved in the Google folder
  - Chairs & deans will need to have access to download, print, & copy.
  - It is up to the departments and colleges if a dean uploads (using manage versions) or gives it to the assistant to upload (using manage versions).
- Please be sure to use the following naming guidelines so files stay together for reviewers.
  - Ledgerwood-AdminBinder-2021-22
  - Ledgerwood-FacultyBinder-2021-22
  - Ledgerwood-FormB-2021-22
  - Ledgerwood-FormE-2021-22
- Assistance in digitally signing forms is available online (<https://www.mtu.edu/fso/financial/information-systems/documents/pdf-with-signature-field.pdf>)

# Assembling Binders

- Steps related to assembling a binder
  - Download appropriate binder (see *Promotion, Tenure and Review* at <https://www.mtu.edu/hr/current/faculty/>).
  - Add materials to the binder & upload to the appropriate Google folder.
  - Complete and upload forms to the appropriate Google folder.
    - Instructions are included in the binder.
  - Move folders within Google.
  - Change ownership of files/folders.
- NOTES
  - For each document, be sure to disable printing/downloading/sharing.
  - Use “manage versions” when uploading revised binder.
    - otherwise need to disable printing/downloading/sharing each time a new version is uploaded .


# Assembling Binders Cont.

- Download admin binder and docs documents titled "SAMPLE" from email.
- Insert documents under appropriate cover pages. There are ways to insert documents.
  - Using the thumbnail view (can be found on left side bar) or
  - Organize pages (can be found on right side bar).
- Save document & upload to Google folder.



# Disable downloading, printing, & copying

Must be done for each binder

- Right-click on file
- Select "Share"
- Click on the cogwheel   
(upper right hand corner)
- Uncheck "viewers and commenters can see the option to download, print, and copy"

Editors can change permissions and share

Viewers and commenters can see the option to download, print, and copy



# Manage Versions

- Right-click on file
- Select "Manage versions"
- Click "Upload New Version"
- Select file
- Click "Upload New Version"

## Manage versions

Older versions of 'TEST-fac-appt-recommendation-ProvostSigned-07Oct2020.pdf' may be deleted after 30 days or after 100 versions are stored. To avoid deletion, select **Keep forever** in the file's context menu. [Learn more](#)

UPLOAD NEW VERSION



Current version TEST-fac-appt-recommendation-ProvostSigned-0...  
Wed 10:35 AM Amie Ledgerwood



# January

- Unit TPR completes review and recommendations for respective tenure-track (interim & major) and non-tenure-track (appointments & lecturer promotion) reviews.
  - submits recommendation memos and signed forms to assistant for binder.

- Colleges with Departments

chair:

- completes review and digitally signs the appropriate forms for T/P & NTT appointments & lecture promotions, and
- submits recommendation memos and signed forms to assistant for binder.

assistant:

- ensures recommendations from unit TPR and chair review are in the respective binder,
- uploads binder and signed forms to respective Google folder, and
- changes ownership of tenure & promotion files to Renee Ozanich ([rozanich@mtu.edu](mailto:rozanich@mtu.edu)).

After deadlines, departments will no longer have access to the files/folders.

- HR provides access to college / inter-school TPR committee, appropriate assistant, and dean.

---

9/17/2021



**Michigan Tech**

# Checking Admin Binder

- Before ownership is transferred be sure all unit level documents are complete in the administrative virtual binder.
  - Be sure to reference the administrative checklist, which is available under Promotion, Tenure and Review at <https://www.mtu.edu/hr/current/faculty/>
- Items in green would all have documents after the respective cover sheets.
  - Colleges without departments would not have a chair recommendation.
- Note: Forms would be saved in the respective Google folder.

- 🔖 2020-2021 Administrative Tenure and/or Promotion Recommendation File (AVB0):
- 🔖 Administrative Tenure and/or Promotion Recommendation Binder
- 🔖 Table of Contents (with links)
- 🔖 Form B (AVB1)
- 🔖 Form A or C (AVB2)
- 🔖 Form E (AVB3)
- 🔖 Draft Letter (AVB4)
- 🔖 Dean's Recommendation (AVB5)
- 🔖 Dean's Recommendation to Faculty (AVB6)
- 🔖 College/Inter-School\* Committee Recommendation (AVB7)
- 🔖 Department Chair's Recommendation (AVB8)
- 🔖 Unit Committee Recommendation (AVB9)
- 🔖 Referee Letters (AVB10)
- 🔖 External Referee Package (AVB11)
- 🔖 Review Solicitation Letter (AVB12)
- 🔖 Referee List (AVB13)



# Changing Ownership

- Right-click on file
- Select "Share"
- Click on the drop down arrow to right of Renee
- Choose "make owner"

The screenshot displays the Google Drive sharing interface. At the top, there is a "Share with people and groups" header with a settings gear icon. Below this is a search bar labeled "Add people and groups". A list of users is shown with their profiles and roles:

- Amie Ledgerwood (you) asledger@mtu.edu - Owner
- Lori Hardyniec lehardyn@mtu.edu - Editor
- Renee Ozanich rozanich@mtu.edu - Editor

Below the list is a "Get link" section with a link icon and the text "Restricted Only people added can open with this link" and "Share with Michigan Technological University".

An orange arrow points from the text "Click on the drop down arrow to right of Renee" to the dropdown arrow next to Renee Ozanich's name. Another orange arrow points from the text "Choose 'make owner'" to the "Make owner" option in the dropdown menu.

The dropdown menu for Renee Ozanich is open, showing the following options:

- Viewer
- Commenter
- ✓ Editor
- Give temporary access  
Comment and view only
- Make owner
- Remove





# February

## Beginning of month:

- Chair completes interim & major reviews & provides assistant with signed forms & information for binder.
- College/inter-school TPR committee sends their confidentiality statement, recommendation, and T/P memo to appropriate assistant to add:
  - Confidentiality statement to the unit's respective Google folder, and
  - Recommendation and memo to the respective binder.

NOTE: After the due date, the committee will no longer have access to these binders/folders.

## Mid & end of month:

- Dean completes and digitally signs the appropriate forms following NTT (appointments & lecturer promotions) interim, and major reviews, and
- Submits recommendation memos and signed forms to assistant for respective binders.
- Assistant changes ownership of the documents to Renee Ozanich (rozanich@mtu.edu).

Note: After this date, college dean and assistant will no longer have access to these binders/folders.

- Dean provides NTT (promotions) & TT (interim & major) faculty with recommendations

9/17/2021



**Michigan Tech**

# March

- Dean completes and digitally signs the appropriate forms following T/P review, and
- Submits recommendation memo and signed forms to assistant.
- Assistant changes ownership of the documents to Renee Ozanich (rozanich@mtu.edu).

Note: After this date (3/4/2022), college dean and assistant will no longer have access to these binders/folders.

- Dean distributes T/P recommendations to faculty.
- HR & provost distribute NTT (appointment & lecturer promotions) & TT (interim & major) review recommendations to deans and faculty.
- Provost and president review T/P materials.
- Provost distributes major review recommendations to individual faculty.

# April

- T/P review and recommendation is complete and communicated to deans, faculty, and the Board of Trustees Secretary
  - Board agenda is made public two weeks prior to April meeting and will include faculty informational sheets.
- Board of Trustees votes at meeting.
  - HR distributes Board actions to deans and department chairs.
  - Supervisor distributes applicable letter to individual faculty.

# Faculty Activity Report (FAR)

- Faculty Activity Report (Promotion and Tenure). The “FAR” is generated electronically using Digital Measures, <https://www.mtu.edu/provost/faculty/reporting/>. The report will automatically pull the correct data history for the tenure and promotion process (up to 10 years, depending on data type).
- If asked to run the FAR
  - Use the following date range: Start Date: September 1, 2021 & End Date: August 31, 2022.
  - These dates indicate the current academic year and are required for the report to operate correctly.
- The Form F that was used in the past is no longer being accepted.
- Digital Measures is now Watermark.
  - “Digital Measures at Michigan Tech” is what you will see in all DM screens.

# **Thank You!**

**Feel free to provide feedback to HR  
or the provost's office at any point  
during the process.**