

PREPARING & SUBMITTING ELECTRONIC PROMOTION MATERIALS FOR TEACHING AND CLINICAL TRACK FACULTY

Thursday, May 21, 2026

9:30 A.M. – 11:00 A.M.

Introductions

We want to know who's with us today, and for you to be able to reach out to your peers who are going through this process with you.

Please tell us in the chat if you plan to apply this year (2026-27).

Welcome!

Goals for today

- Have an operational overview of the process
- Consider how your materials will reflect the 2026-27 Provost's guidelines
- Be familiar with the tools for preparing and submitting your portfolio
- Know how to get help
- Have your pressing questions answered

Electronic Submission is a Three-Step Process

Step 1: Request a folder on the P&T SharePoint using the online request form at <https://www.uml.edu/pandt> by July 1, 2026.

Step 2: Create and refine two pdfs on your desktop—the main and supplemental files—using Adobe Acrobat throughout the summer.

Step 3: Upload your two completed PDFs to SharePoint between September 8 and September 14, 2026 at 5pm.

Operational Overview

Timeline: Your Actions

Now: Review 2026-27 guidelines; plan, create, and organize your materials; seek peer/mentor feedback



Upload your materials electronically
(Candidates with folders will receive an email reminder.)



Deadline to upload main portfolio and
supplemental materials PDFs by 5pm.

After 9/14: Track levels of review in the MSP schedule;
submit responses/addenda as needed to
PandT@uml.edu, CC Dep't Chair & Dean

Key Dates

9/14/26 5:00pm ET	Deadline for individuals to file for promotion and tenure and to submit all necessary supporting materials for Department Chairpersons (via file share).
9/23/26	Provost's Preparation Meeting for P&T Reviewers, 9:00-10:30am. (register by 9/14/26)
10/5/26	Deadline for Chairpersons to submit all individual promotion and tenure materials (inclusive of external letters and reviewer information) for Department Personnel Committees.
10/26/26	Deadline for Department Personnel Committees to forward recommendations and personnel materials for Chairpersons.*
11/2/26	Last day for candidates to file responses to recommendations from Departmental Personnel Committees.**
11/9/26	Deadline for Chairs to forward recommendations and personnel materials for College Personnel Committees.*
11/16/26	Last day for candidates to file responses to recommendations from Chairpersons.**
12/7/26	Deadline for College Personnel Committees to forward recommendations and personnel materials for college deans.*
12/14/26	Last day for candidates to file responses to recommendations from College Personnel Committees.**

** Candidates should email response letters to pandt@uml.edu for upload.

Key Dates, cont'd

1/11/27	Deadline for college deans to forward recommendations and personnel materials for the Rank and Tenure Committee.*
1/19/27	Last day for candidates to file responses to recommendations from Deans.**
2/4 and 2/5/27	University Rank and Tenure committee meets to review applications.
2/16/27	Deadline for University Rank and Tenure Committee to forward recommendations and personnel materials for Provost.*
2/23/27	Last day for candidates to file responses to recommendations from Rank and Tenure Committee.**
3/1/27	Deadline for Provost to forward recommendations and personnel materials for Chancellor.*
3/8/27	Last day for candidates to file responses to recommendations from the Provost.**
3/15/27	Deadline for Chancellor to issue list of recommended candidates for tenure and promotion (before appeals).*
3/22/27	Deadline for eligible candidates to submit appeal to Chancellor.
4/3/27	Deadline for Chancellor to issue final list of recommended candidates for tenure and promotion to the Board of Trustees (after all appeals have taken place).

** Candidates should email response letters to pandt@uml.edu for upload.

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Provost's Guidelines

PDF#1: Main Portfolio Content

These materials may not be edited after the submission deadline.

- [Cover page](#), to include:
 - name
 - present rank
 - department and college
 - date of appointment at the University of Massachusetts Lowell and rank awarded
 - number of years credited for prior service awarded at the time of hire, and promotions awarded at other institutions, if applicable
 - area of specialization within the discipline
- Candidate's Curriculum Vitae (CV) (MSP contract Appendix A-9, Personnel Form #6)
The CV is intended to provide the accomplishments of the candidate's entire career, including the specific details of accomplishments at UMass Lowell. Accomplishments from the period under review are typically provided in bold face type. There is no page limit for the CV.
- Candidate's Narrative—recommended length, approximately 5 to 7 pages
- Instructional Activity Chart ([Appendix 6](#))
- Clinical Review Letter (Clinical Faculty Only) ([Appendix 8](#))

Provost's Guidelines

PDF #2: Supplemental Materials Content

These materials may not be edited after the submission deadline.

Required

- All annual or periodic evaluations by the Department Personnel Committee, department chair, and dean (include formal evaluations and classroom observations of teaching; exclude reappointment letters)
- Student evaluations from the period under review, **including scanned copies of all pages/sides of all completed evaluation forms**, including numerical ratings and written comments. (Per agreement with MSP faculty are not required to share evaluation results from Spring 2020, Fall 2020, and Spring 2021; candidates may include evaluations from these semesters if they wish.)

Optional

- Other supplemental content that significantly advances or illustrates the case that cannot be sufficiently expressed in the CV or narrative – in consideration of the readers, the candidate should include only the most critical items, and should label them clearly
- COVID-19 Personal Impact Statement

There is no preclusion of the candidate to include any item that they deem important. However, candidates are advised that reviewers are unlikely to put weight on ancillary material or documentation beyond what is indicated above. Accordingly, candidates are advised to focus their efforts to ensure that their narrative and CV are thorough and complete.

Preparing the Instructional Activity Chart (Appendix 6) and Student Evaluations

- **Start early!**
- **Gather all of your student evaluations; confirm what surveys you have in SFI** ([more on this shortly](#))
- **Make your list of any missing items**
- **Make a plan to scan**
- **Apply clear file names**

Our [online sample](#) includes tips for customizing your chart.

Instructional Activity Chart (Appendix 6)

Instructional summary by semester for the period under review						
Course Title		Number and Section	Course Credits	Contact Hours	Enrollment	Average of Evaluation Items on a scale of 5
Fall 2023			10	12	110	4.36
	Intro to X	xxxx.1xxx-202	3	3	47	4.23 ¹
	Intro to X	xxxx.1xxx-209	3	3	44	4.1 ¹
	Advanced Y ²	xxxx.4xxx-201	4	6	19	4.75 ¹
Spring 2024			12	12	127	4.16
	Intro to X	xxxx.1xxx-201	3	3	40	4.3
	Intro to X	xxxx.1xxx-204	3	3	46	4.41
	Intro to X ³	xxxx.1xxx-301	3	3	22	3.78
	Topics in Z	xxxx.4xxx-201	3	3	19	4.81
TOTALS	Unique Courses	Sections	Total Course Credits	Total Contact Hours	Total Enrollment	Overall Average of Evaluation Items
	3	7	22	24	237	4.34

- Provide the basic data
- Include the survey scale
- **Indicate how the average was calculated**
- Contact hours = weekly hours of class meeting
- Add notes as needed

¹ Average of responses to question 9, "Overall, how would you rate this instructor?" from paper evaluations

² Career-Connected course - marked for LCCE in Catalog

³ You can include other notes **important to your narrative**, e.g. RHED-leadership approved, online, overload, etc., but do not add so many notes that the chart becomes confusing.

Managing Student Feedback Data For Appendix 6 & Supplemental Materials

1. Identify **how** your student feedback from the period under consideration was collected (methods vary by college)
2. Gather **Non-SFI** student feedback as needed, and:
 - a. scan both sides (for supplemental file)
 - b. tabulate averages (for Appendix 6)
3. From SFI, download your student feedback **averages** from all surveys you have in the system (for Appendix 6)
4. Download all of your SFI reports as a single PDF
(This will automatically include data and student comments)

See our accompanying handout for detailed instructions.

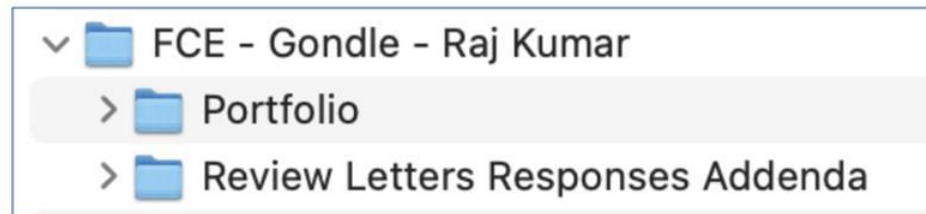
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Promotion and Tenure SharePoint

The SharePoint contains candidate folders sorted by college, last name, first name.

Each candidate folder contains two additional folders:



Promotion and Tenure SharePoint Structure

Folder #1 Portfolio

Candidate has write access until September 14, when the folder will be "frozen."

After September 14, the candidate has read access.

Items include two PDF files:
1) Main Portfolio
2) Supplemental Materials

Folder #2 Review Letters, Responses, Addenda

PandT@uml.edu has write access and uploads all documents.

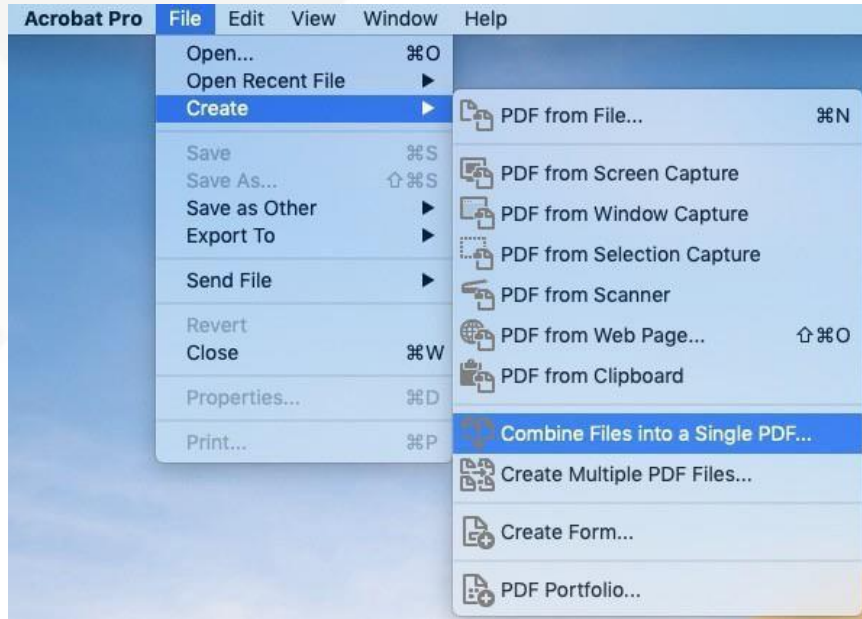
Items Include:

- 1) Review Letters
- 2) Addenda from Candidates:
Honors or awards received after final submission of the candidate's portfolio
- 3) Any candidate responses to recommendation letters by various levels of review.

Preparing Materials

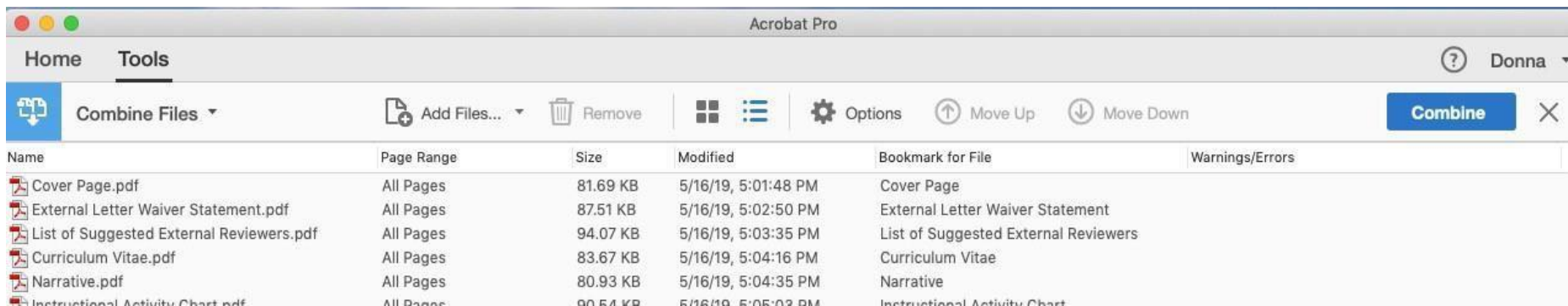
- Update to Adobe Acrobat, if needed
- Create materials on your desktop
- Convert items to PDF as you go; name files for easy recognition/bookmarks
- Create two PDFs for submission: order of materials in each file should follow the guidelines
- Clean up bookmarks list

Portfolio Creation



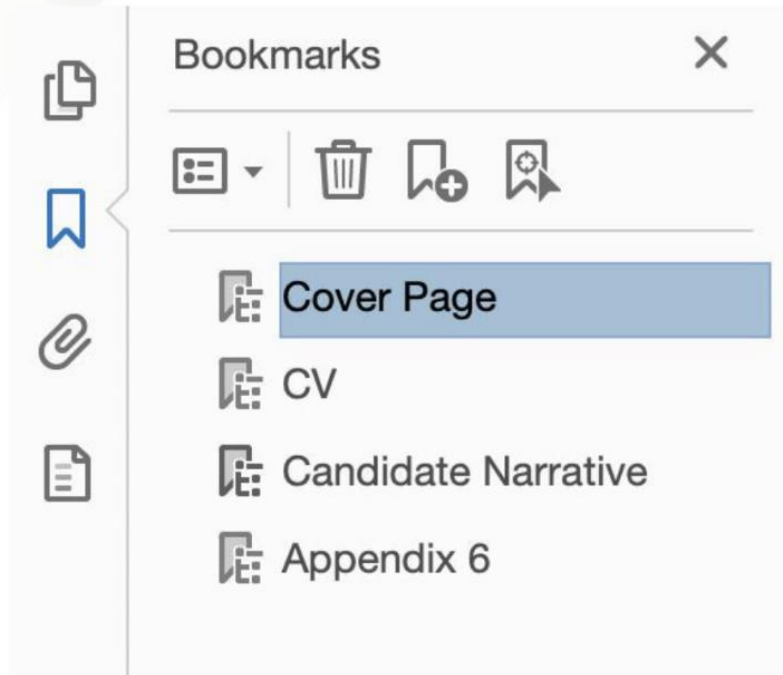
File • Create • Combine Files into a Single PDF

- Drag & Drop
- Reorder (Move Up/Down)
- Select Combine



Portfolio Creation

(continued)



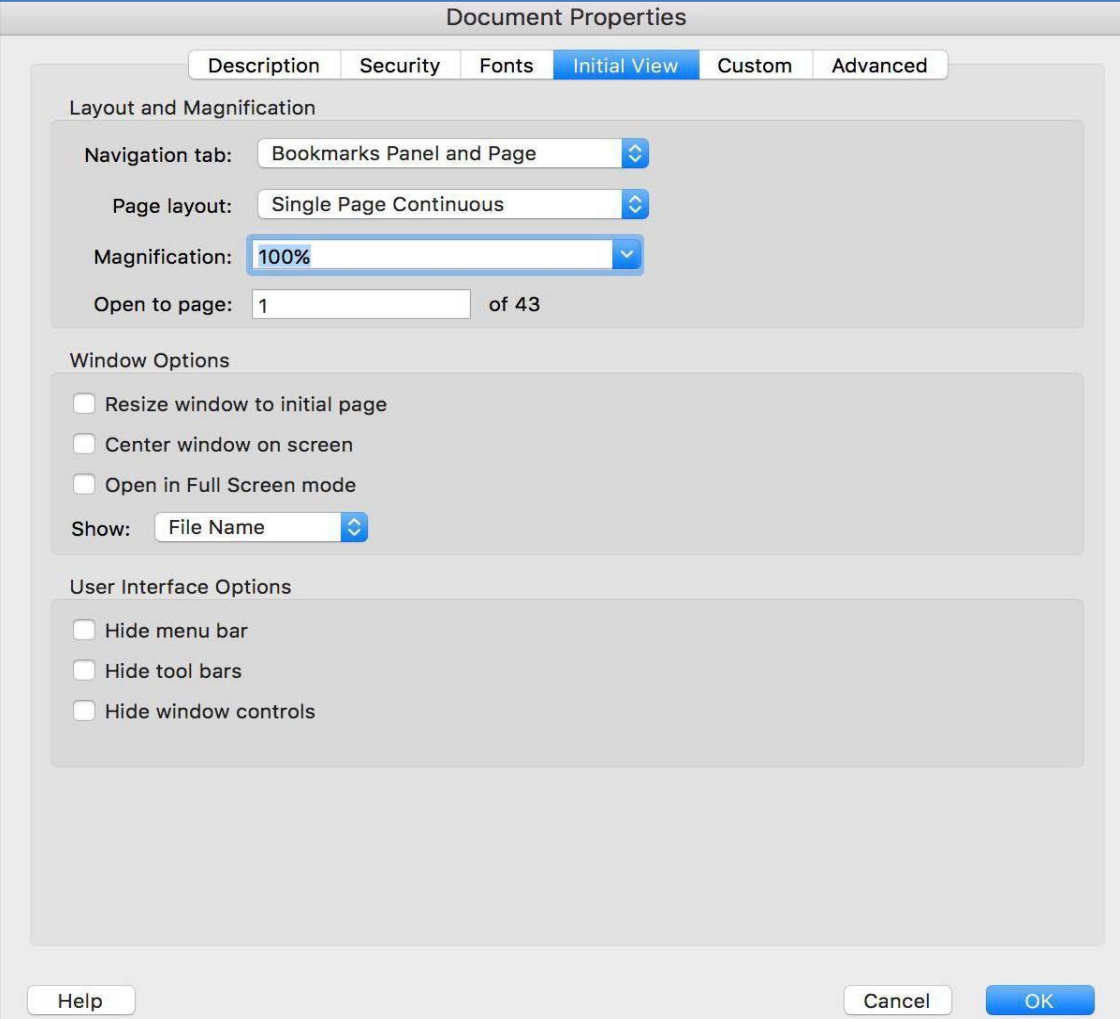
Readers need clear bookmarks!

- File names are automatically imported as bookmarks
- Bookmarks can be edited
- Rearranging bookmarks \neq rearranging pages
- Deleting bookmarks \neq deleting pages

Portfolio Creation (continued)

Set default
initial view.

**Readers
expect this
format!**



The screenshot shows the 'Document Properties' dialog box with the 'Initial View' tab selected. The 'Layout and Magnification' section includes dropdown menus for 'Navigation tab' (Bookmarks Panel and Page), 'Page layout' (Single Page Continuous), and 'Magnification' (100%), along with a text field for 'Open to page' (1 of 43). The 'Window Options' section has three unchecked checkboxes: 'Resize window to initial page', 'Center window on screen', and 'Open in Full Screen mode', plus a 'Show:' dropdown set to 'File Name'. The 'User Interface Options' section has three unchecked checkboxes: 'Hide menu bar', 'Hide tool bars', and 'Hide window controls'. Buttons for 'Help', 'Cancel', and 'OK' are at the bottom.

Document Properties

Description Security Fonts Initial View Custom Advanced

Layout and Magnification

Navigation tab: Bookmarks Panel and Page

Page layout: Single Page Continuous

Magnification: 100%

Open to page: 1 of 43

Window Options

Resize window to initial page

Center window on screen

Open in Full Screen mode

Show: File Name

User Interface Options

Hide menu bar

Hide tool bars

Hide window controls

Help Cancel OK

*And now a quick
demo . . .*

Cleaning up your main and supplemental files

Materials cannot be edited after the submission deadline.

- Remove locked or password-protected PDFs
- Proofread carefully
- Check bookmarks and links

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Who needs a SharePoint folder?

As soon as possible (by **July 1**), submit a folder request at www.uml.edu/pandt if you are intending to submit materials this year.

By **September 8**, you will get an email confirming that the file share is available, with instructions for connecting from your PC or Mac.

Upload your two PDF files by:

September 14
at 5:00 p.m.



What if I change my mind?

- Any faculty member may remove their materials from consideration at any point.
- Faculty should consult with their Department Chair before submitting a request to withdraw.
- Please email PandT@uml.edu with a CC to your Department Chair to request to have your materials removed from consideration.

What happens after September 14?

- The first review begins at the Department Personnel Committee level on October 5.
- Candidates receive recommendation letters via email according to the [P&T schedule](#) deadlines.
- After September 14, the candidate may submit addenda to the process to share significant new updates.

Addenda

Candidate materials are “frozen” on Sept. 14 at 5:00 p.m.; updates can be included via addenda.

- Addenda consist of honors or awards received after final submission of the candidate’s portfolio
- Each addendum should be submitted to PandT@uml.edu as a single PDF:
 - Address the next level of review
 - Give a brief explanation of the addendum & its significance
 - Include any relevant award or acceptance letter
- Only the candidate may submit addenda

Candidate Response Letters (optional)

- Candidates may provide responses to recommendation letters.
- Response letters are optional and are used to clarify inaccuracies or oversights in a recommendation letter.
- Address response letters to the next level of review.
- Submit to PandT@uml.edu in accordance with the [P&T schedule](#).

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Getting Help

- Our website: www.uml.edu/PandT
 - Provost's guidelines, calendar, user guides, and useful links
- Department Chair and Colleagues
- P&T Team Help session
 - Schedule early
- Email "hotline": PandT@uml.edu

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