This document provides the College of Agriculture and Life Sciences (CALS) template for the P&T Portfolio Summary (Tab 2). We encourage all faculty in CALS to use this template. Those with Extension appointments are required to use the template. For faculty in departments that are jointly administered with another college and who have teaching and research appointments only, please discuss the choice of templates with your chair.

The Portfolio Summary is an explanation of your accomplishments that places them in context. It interprets, analyzes and evaluates your accomplishments and provides evidence of their importance and impact. It also describes your role in collaborative activities. It is through the Portfolio Summary that you demonstrate you have met the criteria for advancement (see below). The template is designed to follow these criteria.

Please use the major headings (those in bold) from the template in your Portfolio Summary (except in cases where the heading is not relevant to your position responsibilities in which case it can be omitted). See Appendix 1 for definitions of key terms. Repetition of information contained in the CV is unnecessary.

Candidates are encouraged to review the ISU Faculty Handbook, Section 5.2 which explains the promotion and tenure process and criteria for advancement. https://www.provost.iastate.edu/policies/faculty-handbook

Candidates are encouraged to access the Provost’s website for Faculty Success, Faculty Advancement and Review for current versions of forms and best practices information. https://www.provost.iastate.edu/faculty-success

Candidates are encouraged to contact the Provost's office to request viewing of successful dossiers on file.

**Tab 1: Factual Information Summary, PRS and Curriculum Vita**

- Candidates are encouraged to ensure the data provided in the Factual Information Summary exactly matches the information provided in the Curriculum Vita and Tab 2.

- Include all PRSs for the timeframe of the review. These must be signed versions of the PRS downloaded from WorkDay.

- The Curriculum Vita has no page limit and should be comprehensive of the entire academic career of the candidate. Clearly separate work done during the period of the review from the entire body of work using headers or tables in the curriculum vitae.

**Tab 2: Faculty Portfolio - CALS Template**

**Table of Contents (use page numbers in the portfolio)**

**Executive Summary (optional)**
This should be a concise overall assessment of achievement during the review period in each area of the PRS, summarizing and highlighting the most impactful indicators of success.

1. **Performance in Scholarship (Required of all candidates)**

This section provides an opportunity for the candidate to demonstrate excellence in scholarship. It begins with an overall statement of the candidate’s accomplishments in scholarship as they relate to teaching, research/creative activities, and extension/professional practice. It must include a self-assessment of scholarly accomplishments that have been validated by peers. (Source: ISU Faculty Handbook, 5.3.2.1).
The following topics are required in this section:

- Scholarship philosophy and goals
- The context and impact for your scholarship
- Completed and current programs and projects
- Self-assessment of accomplishments
- Self-assessment of refereed journal articles, books, book chapters, and other peer-reviewed products
- Self-assessment of other means used to share your scholarship (such as invited presentations)
- Self-assessment of sponsored funding
- Self-assessment of disclosures, licenses, patents, and inventions
- Honors and awards received
- Plans for future scholarship

2. Performance in Position Responsibilities (since appointment or last promotion – include only those sections that are included responsibilities in your PRS)

2.1 Teaching

The following topics are required in this section:

- Teaching philosophy statement
- Teaching responsibilities (including percent effort from PRS)
- Narrative description plus a tabular list of courses taught using the following format and beginning with the most recent semester:

<table>
<thead>
<tr>
<th>Semester &amp; Year</th>
<th>Course #</th>
<th>Course Title</th>
<th>Enrollment</th>
<th>Percent of course for which responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2026</td>
<td>AGRON 344</td>
<td>Soil Science</td>
<td>150</td>
<td>10%</td>
</tr>
</tbody>
</table>

- Summarize results of student evaluations of teaching (overall rating of instructor and overall rating of course) in tabular form using 5 point rising scale and including comparison to departmental norms:

<table>
<thead>
<tr>
<th>Semester &amp; Year</th>
<th>Course #</th>
<th>Total Enrollment</th>
<th>% Students responding</th>
<th>Overall Rating of Instructor</th>
<th>Department Mean for Comparable Courses (instructor)</th>
<th>Overall Rating of Course</th>
<th>Departmental Mean for Comparable Courses (course)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spring 2028</td>
<td>AGRON 344</td>
<td>150</td>
<td>65%</td>
<td>3.8</td>
<td>4.0</td>
<td>4.1</td>
<td>3.9</td>
</tr>
</tbody>
</table>

- Self-assessment of curriculum development and teaching materials development
- Self-assessment of teaching effectiveness
- Summarize procedures for and results of peer evaluation of teaching (letters from peers may be placed in Tab 3)
- Evidence of learning enhancement, including personal professional development and future teaching plans
- Self-assessment of sponsored funding related to teaching and learning

Undergraduate Advising

- Describe advising responsibilities, including a table of number of advisees by major and semester/year. Provide evidence of effectiveness in advising, including advisor survey data. Describe professional development related to advising.
- Describe Capstone project advising (mentoring) students and their projects if relevant.
- Describe Honors advising (mentoring) students and their projects if relevant (this may be included in research if preferred).
- Describe internships and/or undergraduate student research mentees if relevant.
- Work with K-12 students may be included here if relevant.
Graduate advising

- Describe personal graduate student mentoring philosophy and approach, and the department/major graduate student expectations. Describe impact of graduate student mentoring.

MS Program of Study Committees

- List students in chronological order from current to completed. Included student name, major/program, date started and completed (or in progress).
- Separate groups by headers of your role: Major Professor | Co-Major Professor | Program of Study Committee | External Examiner

PhD Program of Study Committees

- List students in chronological order from current to completed. Included student name, major/program, date started and completed (or in progress).
- Separate groups by headers of your role: Major Professor | Co-Major Professor | Program of Study Committee | External Examiner.

Visiting Scholars

- List visiting scholars or scientists, including name, home institution, dates of visit, project/outcome of work.

2.2 Research and/or Creative Activities

Your accomplishments in research should be addressed here. Describe the outputs of research programs, highlighting the impact of the work in the discipline. Define the national and international recognition of your work. An effective presentation approach is to describe each research program/project area and include the funding, graduate students, publications and presentations and impacts associated with each program. Include future research plans and goals.

In CALS, faculty without formal Extension appointments may be engaged in outreach. Outreach activities may be listed here or under Institutional and/or Professional Service.

2.3 Extension

For faculty with a formal budgeted appointment in Extension. Your accomplishments in scholarship related to extension belong in Performance in Scholarship (above, see # 2). The following topics are addressed in this section:

- Statement of extension philosophy
- Extension responsibilities and/or extension focus areas (including percent effort from PRS)
- Summary of Extension program(s) (see definition in Appendix) using tabular and/or narrative format
- Self-assessment of program impact (individual and/or team)
  o Summarize procedures for and results of program impact
  o Leadership and contributions to team program and program impact
  o Success stories that have resulted from programming efforts
  o Needs assessment efforts
- Assessment of Extension presentation effectiveness
  o Summarize results of participant evaluations of presentations - tabular form
  o Summarize procedures for and results of peer evaluation of presentations (letters from peers may be placed in Tab 3)
  o Evidence of learning gains
- Self-assessment of outputs that comprise your program(s), i.e., curriculum and training materials; factsheets, newsletters and other written materials; software, apps and decision aids development for Extension and presentations
- Summarize Extension stakeholder advising of agencies or organizations with which you engage
- Multi-state Extension committees with which you engage
2.4. Institutional and/or Professional Service (expected of all faculty)

The following topics are addressed in this section (Include those that apply):

- Service responsibilities (including percent effort from PRS)
- Self-assessment of departmental, college, and university service
- List committee memberships and/or leadership roles and comment on quality of contributions to these groups
- Self-assessment of service that address college and/or university priorities
- Self-assessment of professional committees and professional service
- Professional service such as journals and grant proposal review for funding agencies
- Honors and awards received for service related to teaching, research, extension and administration

2.5 Administration

For faculty with a defined administrative responsibility (such as Director of a Center or Institute), the following topics are addressed in this section:

- Description of administration responsibilities
- Number and types of personnel supervisory responsibilities
- Programs and/or activities directly associated with your leadership role
- External relationships and/or collaborations developed
- Funding secured or received due to your leadership role
- Self-assessment of impact in administrative role
- Honors and awards for administration

3. Final Reflections (Optional)

This section provides an opportunity for you to make any closing comments if you choose.

Total page length of Tab 2 cannot exceed 25 pages.
No additional documents are allowed beyond the page limit (eg appendices, letters or other materials).
Note that teaching peer evaluations or Extension reviews may be included in Tab 3.
Appendix 1: Definition of Key Terms and Concepts

Scholarship of Teaching and Learning (SoTL): "At Iowa State University, SoTL contributes to the discovery of knowledge about teaching and learning in higher education and must be held to the same standards of rigor, relevance, peer review, and dissemination as other forms of disciplinary research and creative activity." (ISU Faculty Handbook, 5.2.2.4). “The scholarship of teaching and learning goes beyond simply using effective or innovative teaching methods in the classroom, commonly called scholarly teaching. It involves inquiry into teaching, engagement, feedback, and reflection on teaching and learning. It also includes sharing results so others can review, critique and build on the work.” (Source: CELT Web site: http://www.celt.iastate.edu/for-faculty/sotl/)

Scholarship of Research/Creative Activities: "Faculty members who engage in research/creative activities are expected to make original contributions that are appropriate to their chosen area of specialization and that are respected by peers within and outside the university.” (Source: ISU Faculty Handbook, 5.2.2.4).

Scholarship of Extension: “Faculty members may engage in extension/professional practice activities by utilizing their professional expertise to disseminate information outside of the traditional classroom to help improve the knowledge and skills of their clientele (i.e., the publics they serve) or the environment in which they live and work.” (Source: ISU Faculty Handbook, 5.2.2.5).

“The scholarship resulting from extension/professional practice activities is documented through means appropriate to the professional specialty, such as peer-reviewed publications, lectures, videos, software, hardware, workbooks, manuals, standards, bibliographies, book reviews, and casebooks. Evaluation of scholarship should consider breadth, depth, and duration of influence or use; public appreciation and benefit; and applicability or adoption by peers.” (Source: ISU Faculty Handbook, 5.2.2.5).

Extension Programs: ISU Extension and Outreach asks faculty to organize their efforts through ‘programs’. Programs are a coordinated set of learning experiences designed to achieve predetermined outcomes. Programs follow a continuum – starting with an initial environmental scanning, followed by application of the learning experiences, and resulting in changes in knowledge, behavior, and condition (as stated in the ISUEO program development process). Outreach: In the CALS, faculty without formal extension appointments may be engaged in outreach efforts that range from very informal efforts (responding to requests for information, speaking at stakeholder conferences, developing a small number of outreach materials, etc.) to formal outreach programs that are very similar to formal extension programs and include a situational or needs analysis, stakeholder interactions, development and delivery of educational curricula, evaluation of outputs, outcomes and impacts.