Promotion To:

PROFESSOR

John Smith

2013-14

Location: Boise

Tenured
FSH 3560 - REPORT OF EVALUATION AND RECOMMENDATION
FOR PROMOTION IN FACULTY RANK
[7-10]

Date ________________________________

Name __________________________________ Unit __________________________________

Considered for promotion to the rank of ___________________________________________________________

Has served in the rank of _______________________________ since _____________________________

====================================================================================================

REQUIRED ELEMENTS OF EVALUATION

Having reviewed the candidate’s curriculum vitae, position descriptions and annual evaluations (including all narratives) we concur in their completeness and accuracy. Other documentary material deemed by either of us to be pertinent has been appended to the curriculum vitae.

(Candidate) __________________________________________ (Unit Administrator) ____________________________

Copies of the documents as referenced in E-2 were made available to the persons or groups called upon to participate in the evaluation of the candidate and to make recommendations on his or her promotion.

(Unit Administrator) __________________________________________

(Unit Administrator, (Faculty with joint appointments))

Interdisciplinary/Center Administrator (when appropriate) ____________________________________________

Interdisciplinary/Center Administrator (when appropriate) ____________________________________________

====================================================================================================

RECOMMENDATIONS

Each reviewing individual enters his/her recommendation below. If there are any considerations that support this conclusion, other than those contained in the records presented to the reviewers, a brief statement of those considerations should be appended.

I judge the candidate’s performance of the duties assigned in his or her position description to be:

_____ exceptional performance
_____ performance above expectations
_____ performance that meets expectations
_____ performance below expectations
_____ unacceptable performance

I _____ recommend
 _____ do not recommend
 _____ abstain from making a recommendation on the proposed promotion.

(Signature) __________________________ (Rank) __________________________ (Unit) __________________________

(Recommendations continue on back of form)
Evaluations of the candidate and recommendations on the proposed promotion have been submitted by ____ faculty members. Of these, ____ judged the candidate’s performance of assigned duties to be exceptional, ____ above expectations, ____ meets expectations, ____ below expectations, and ____ unacceptable.

Moreover, ____ recommended promotion, ____ recommended against it, and ____ abstained from making a recommendation.

I ____ do ____ do not recommend that the candidate be promoted. [It is suggested that a narrative statement in support of the recommendation be appended.]

__________________________
(Unit Administrator)

The college committee on promotions ____ does ____ does not recommend the proposed promotion. The committee’s vote was: ____ in favor of, and ____ against the promotion, and there were ____ abstentions.

__________________________
(Committee Chair)

The unit administrators of this college (did) (did not) meet to consider collectively all of the recommendations submitted by the units. The vote of this group was: ____ in favor of, and ____ against the promotion, and there were ____ abstentions.

I ____ do ____ do not recommend that the candidate be promoted. [It is suggested that a narrative statement in support of the recommendation be appended.]

__________________________
(Dean)

In the university-level review committee, the votes were: ____ in favor of, and ____ against the promotion, and there were ____ abstentions.

__________________________
(Provost)

I ____ do ____ do not recommend that the candidate be promoted.

__________________________
(Provost)

I ____ do ____ do not approve the promotion.

__________________________
(President)
Section 8.3 Promotion and Tenure.

(a) Academic Unit Jurisdiction. Each academic unit of the College has initial jurisdiction over tenure, promotion, and retention decisions. While final determination over all such decisions rests ultimately with the dean and the president, the recommendations and decisions of the academic unit shall be accorded substantial weight and only overruled in extenuating circumstances and for just cause.

(b) General Considerations. All recommendations regarding tenure and promotion within an academic unit will be made in accordance with these bylaws and the rules and procedures of the University as set forth in the Faculty-Staff Handbook, Sections 3520 and 3560. The recommendations from the unit administrator of an academic unit and from the unit’s promotion and tenure committees will be forwarded to the dean and become part of the file of the candidate for tenure or promotion. Summaries of the recommendations will be provided to the candidate.

(c) Criteria for Tenure and Promotion. Although dismissal for cause after the award of tenure is a condition of a grant of tenure, the College and each academic unit are guided fundamentally by the assumption that tenure implies a life-time appointment. Tenure and promotion are the result of a reasoned assessment of the long-term value and effectiveness of the candidate as a member of his or her academic unit. Each academic unit will develop its own criteria for tenure and promotion, consistent with the Faculty-Staff Handbook, Sections 3520 and 3560.

(d) Tenure and Promotion Committees. The composition of the committees for tenure and promotion will be as provided in the Faculty-Staff Handbook, Section 3520 H-4 (Tenure) and Section 3560 E-3 (Promotion).

(e) Procedure and Timeline. Departmental consideration of candidates for promotion and tenure will occur during the fall semester. It is the responsibility of the unit administrator of each academic unit to apprise candidates for tenure or promotion of the tenure and promotion processes, including the annual and third-year reviews, and encompassing the areas of performance evaluated and the criteria used, soon after the faculty member’s tenure track appointment at the University. Unit administrators are responsible for periodically reminding faculty of all pertinent performance reviews and tenure and promotion processes. All necessary committees for performance review, including third-year review, periodic review, and promotion and tenure will be created by consultation between the academic unit administrator and the candidate for performance review. The unit administrator, again in consultation with candidates for tenure or promotion, and in accordance with Faculty-Staff Handbook, Section 3520 H-4b, will determine appropriate persons to serve as external peer reviewers. Candidates for tenure or
promotion will be provided, upon request, with copies of all external review letters, with all marks identifying the authors thereof removed, prior to the academic unit’s committee meeting(s) on tenure or promotion. Upon completion of the academic unit’s committee meeting(s), the unit administrator will promptly advise the candidate of the committee recommendations, providing the candidate an opportunity to withdraw his or her candidacy and halt the process. The candidate also may respond in writing to clarify the situation if he or she believes his or her record or the academic unit’s criteria were misinterpreted. Any such response letter will be forwarded with the rest of the candidate’s materials to the College.

(f) **External Peer Review.** Candidates for tenure and promotion will undergo external peer review following the procedures as described in the *Faculty-Staff Handbook*, Section 3520 H-4b.
ARTICLE VI. TENURE, PROMOTION AND REVIEW

Section 1. Departmental Jurisdiction. The Chemistry Department has initial jurisdiction over tenure, promotion, and retention decisions; final decisions rest ultimately with the dean and the president. Each department within the college has the authority to make recommendations which play a major role in such decisions. The Faculty-Staff Handbook shall be the definitive source of information about promotion and tenure and shall be used for the resolution of differences.

Section 2. General Guidelines. Granting of tenure is based on a reasoned assessment of the continuing value of the candidate as a member of the Chemistry Department. While dismissal for cause after the award of tenure is possible, the department must be guided by the assumption that tenure implies a lifetime appointment. The University of Idaho Office of the Provost Promotion/Tenure Guidelines (see Provost Office homepage) outlines the general procedures to be followed. The following criteria shall be used in making tenure and promotion recommendations.

A. Teaching: Demonstrated ability as a teacher as evidenced by the formal evaluation by students, informal commentary by students and colleagues, course content and examinations, ability to guide teaching assistants in their teaching assignments, and ability to guide research students through specialized research projects.

B. Scholarship: It is the policy of the Department of Chemistry to emphasize and promote quality research. Consequently, the evaluation of a departmental candidate for promotion and tenure includes this area in the overall assessment. This particular area of evaluation is based upon: 1) the quantity and quality of professional production with significant emphasis on refereed full articles in prominent chemical journals/books; 2) a demonstrated ability to maintain a viable research program based upon the procurement of sufficient external support; and 3) the candidate’s ability to attract, direct, and graduate students at the B.S., M.S., and Ph.D. levels. Demonstration must be primarily by publication in prominent refereed journals (such as those of the American Chemical Society). It is expected that multiple-authored publications will be from ideas developed by the candidate and from work done during the probationary period at Idaho. While it is not possible to state precisely the amount of work that will be required, regular publication of full papers on an annual basis is expected. Formal presentations of scientific material at professional meetings are also expected. In all cases, external peer review is solicited on each candidate from schools with comparable resources and missions.

C. Service: Efforts include informal or formal student advising; service on department and university committees; student recruitment; mentoring newer faculty members; informal presentations of a professional nature to local and regional groups; reviews of manuscripts, books, or professional journal articles; service as an officer of a professional organization, etc.

D. External Funding: Candidates are expected to obtain sufficient external support to maintain a viable research program.

E. Job Description: The relative weighting of each of these areas will be in proportion to the corresponding percentage of the job description. For example, a research professor whose job description excludes teaching will be evaluated on criteria B and C and will be expected to be proportionately more productive in those areas than a faculty member whose research commitment is less. Conversely, a faculty member with a higher percentage of teaching in the job description will be evaluated more heavily on criterion A, although scholarly activity will still be expected in proportion to the percentage of the job description.
F. External Peer Review. In addition to an “internal” review by departmental members, an “external” peer review constitutes an essential component of the evaluation procedures. This external review will be conducted in accordance with Provost Office Guidelines for External Peer Review (see Provost Office homepage) and in the following manner. The department chair will send a copy of the candidate’s current vita and supporting documentation to faculty of chemistry departments at peer institutions, defined as those institutions included in the top 150 universities in external support funding listed by the National Science Foundation. The accompanying letter prepared by the chair asks each of the external reviewers to evaluate the candidate’s performance in (a) teaching, (b) publications, (c) research funding, and (d) departmental/university service and professional activities such as participation in scientific meetings, invited lectures, involvement in professional societies, etc. This letter also requests an answer to the question: Would this candidate be promoted and awarded tenure currently in your department based on his/her performance on points (a)-(d)? These external reviews are used to supplement the other information evaluated by the departmental committee, i.e., the candidate’s performance in the important areas of teaching, service, and collegiality.

Section 3. Procedures. Departmental promotion and tenure recommendations are made and competency reviews are carried out in accordance with the procedures outlined in Appendix 1 (“Department of Chemistry Criteria for Promotion and Tenure: Tenure Recommendation and Competency Review Committee,” approved October 17, 1975, revised September 8, 2000, and September 2004).

Section 4. Third Year Review. The tenured faculty of the department will conduct a third year review of all untenured faculty in accordance with Section 3520.H-3. of the Faculty-Staff Handbook. The departmental procedures for the third year review are outlined in Appendix 2 (“Department of Chemistry: Procedures for Third Year Review”). The purpose of this review is (1) to give the faculty member an early indication of his/her potential for tenure; (2) to remind the faculty member of the criteria on which tenure and promotion decisions are normally based, and to inform him/her of any other circumstances which might affect a decision in his/her case; (3) to inform the faculty member of any deficiencies which might lead to a negative tenure decision and to make suggestions, when appropriate, for correcting them; or (4) to recommend against reappointment. This will not be interpreted to mean that a faculty member’s contract cannot be terminated before the end of the third year, since all appointments at the university are for one year.
Appendix 1

DEPARTMENT OF CHEMISTRY
TENURE AND PROMOTION RECOMMENDATION COMMITTEE

September 2004

SECTION I. MEMBERSHIP OF COMMITTEE

A. The tenure and/or promotion committee and competency review committee shall be composed of eight (8) members appointed by the departmental chair and selected as follows:

1. Four (4) members and three (3) substitutes chosen by lot from the tenured faculty, excluding the chair of the department. At least one member should have the rank of full professor, and at least one member should have the rank of assistant or associate professor.
2. One (1) member and three (3) substitutes from (a) the untenured faculty of the Chemistry Department, or (b) from the faculty of other science-related departments.
3. One (1) member and three (3) substitutes chosen by lot from among upper-division students majoring in chemistry.
4. One (1) member and three (3) substitutes from among the graduate students of the Chemistry Department, chosen by election by the graduate students.
5. One (1) member and three (3) substitutes from the tenured faculty of departments other than chemistry, selected by the chemistry faculty.

B. A faculty member under consideration by the committee shall have a right to challenge the appointment of up to three members of the committee without cause. The three challenges may include substitutes chosen after an initial challenge. He/She must exercise his/her challenge in writing delivered to the department chair at least three days ahead of the first meeting of the committee. A member of the committee who is challenged shall be replaced by the next substitute in his/her category.

C. The chair of the committee shall be selected by vote of the committee from among the tenured members of the Chemistry Department chosen for the committee.

D. A quorum of the committee shall be six members or their duly selected substitutes. Only a faculty member under consideration may raise a question as to a quorum.

SECTION II. DUTIES OF COMMITTEE

The committee shall make a recommendation as to tenure and/or promotion of a faculty member (a) when the policy of the Board of Regents requires that he/she be considered for such, or (b) when requested by the chair or a majority of the tenured faculty of the department, or (c) when requested for himself/herself in writing delivered to the department chair.

SECTION III. HEARINGS

A. If the committee members deem it necessary, they shall hold hearings for the taking of evidence with respect to the faculty member under consideration. The hearings shall be closed unless the faculty member under consideration desires that it be open. The committee chair may close a hearing to all persons except members of the committee and the faculty member under consideration if necessary to maintain order.
B. Evidence offered at the hearing should be related primarily to the job description developed for the faculty member in question and may include results of student evaluations.

C. A member of the committee or the faculty member under consideration may offer, or object to, evidence and may include evaluations from alumni or professional chemists outside the university.

D. A faculty member under consideration shall have the right personally to confront, and to cross-examine, each witness against him/her.

E. The chair shall rule conclusively for the committee on all procedural points and on the admissibility of evidence.

SECTION IV. MEETINGS

A. After evidentiary procedures are completed, the committee shall meet to decide, based on the evidence presented, whether to recommend the granting of tenure and/or promotion. The meetings of the committee shall be closed.

B. The chair of the committee shall preside at meetings and shall have a vote.

SECTION V. DETERMINATION OF RECOMMENDATION FOR TENURE AND/OR PROMOTION

A. The committee members shall vote by secret ballot either for or against tenure and/or promotion with attached comments, as appropriate, supporting their decision.

B. The committee chair will then forward to the department chair all of the ballots along with a written summary of the committee’s deliberations.

C. The department chair will convene a meeting of all of the tenured faculty having rank higher than the candidate who will be informed of the committee decision. After a suitable period of discussion, the faculty will vote by secret ballot either for or against tenure and/or promotion with attached comments, as appropriate, supporting their decision.

D. The department chair will then forward the decisions of the committee and the voting faculty to the dean of the College of Science along with a written narrative outlining the relevant discussion points.
Date: December 1, 2013

To: Doug Baker, Provost and Executive Vice President

From: Dean, College of __

Subject: Promotion of Dr. John Smith, Department of __

Letters/memos should summarize the case, identify major points and report your (dean’s) recommend or do not recommend decision. This recommendation should be specific to the candidate, not a form letter. Please remember that in each stage of the process where a recommendation is made, a copy of the letter must be sent/shared with the candidate. The candidate has the right to respond in writing for the file. The candidate is allowed one week’s time to respond before the packet is sent forward to the next level of review.

Policy allows for the dean/joint administrator to incorporate the findings and recommendations of the college committee review, administrators of the college recommendation in his/her communication to the faculty member. It is important to ensure in such instances, that the candidate is aware of the process.
Date: December 1, 2013

To: Doug Baker, Provost and Executive Vice President

From: Joint administrator, Interdisciplinary administrator, CEO of __

Subject: Promotion of Dr. John Smith, Department of __

Letters/memos should summarize the case, identify major points and report your (joint administrator, interdisciplinary administrator, or center executive officer) recommend or do not recommend decision. This recommendation should be specific to the candidate, not a form letter. Please remember that in each stage of the process where a recommendation is made, a copy of the letter must be sent/shared with the candidate. The candidate has the right to respond in writing for the file. The candidate is allowed one week’s time to respond before the packet is sent forward to the next level of review.

Policy allows for the dean/joint administrator to incorporate the findings and recommendations of the college committee review, administrators of the college recommendation in his/her communication. It is important to ensure in such instances, that the candidate is aware of the process.
Date: December 10, 2010
To: Dean, College of __
From: Departmental Administrators of the College of __
Subject: Promotion of Dr. John Smith, Department of __

Letters/memos should summarize the case, identify major points and report the committee's recommend or do not recommend decision (if applicable). This recommendation should be specific to the candidate, not a form letter. Please remember that in each stage of the process where a recommendation is made, a copy of the letter must be sent/shared with the candidate. The candidate has the right to respond in writing for the file.
Date: December 10, 2010
To: Dean, College of __
From: College of __ Promotion Committee
Subject: Promotion of Dr. John Smith, Department of __

Letters/memos should summarize the case, identify major points and report the committee’s recommend or do not recommend decision. This recommendation should be specific to the candidate, not a form letter. Please remember that in each stage of the process where a recommendation is made, a copy of the letter must be sent/shared with the candidate. The candidate has the right to respond in writing for the file.
Date: December 10, 2013

To: Dean, College of __

From: Chair, Department of __

Subject: Promotion of Dr. John Smith, Department of __

Letters/memos should summarize the case, identify major points and report your (department head's/chair's) recommend or do not recommend decision. This recommendation should be specific to the candidate, not a form letter. Please remember that in each stage of the process where a recommendation is made, a copy of the letter must be sent/shared with the candidate. The candidate has the right to respond in writing for the file. The candidate has one week's time to respond.

The letter should also include information about candidate’s strengths and weaknesses as perceived at the unit level by both the committee and faculty eligible to vote.
Date: December 8, 2009

To: Dean and/or, Committee and/or, Chair of __

From: Dr. John Smith, Department of __

Subject: Clarification of Promotion of Dr. John Smith, Department of __

If applicable, candidate may address concerns or provide clarifications in writing for the record from any stage of the search where a recommendation is made. The candidate may respond in one week’s time.
CURRICULUM VITAE
University of Idaho

NAME: DATE:
RANK OR TITLE:
DEPARTMENT:
OFFICE LOCATION AND CAMPUS ZIP: OFFICE PHONE:
FAX:
EMAIL:
WEB:

DATE OF FIRST EMPLOYMENT AT UI:
DATE OF TENURE: (Year or untenured)
DATE OF PRESENT RANK OR TITLE:

EDUCATION BEYOND HIGH SCHOOL:

Degrees: (List most recent degree first: Degree, institution name, city, state, date, major or area of specialization.)

Certificates and Licenses:

EXPERIENCE:

Teaching, Extension and Research Appointments: (List position titles and locations since receipt of Bachelor’s degree)

Academic Administrative Appointments: (List position titles and locations since receipt of Bachelor’s degree)

Non-Academic Employment including Armed Forces: (List title, brief description, date)

Consulting: (List company/institute name, title, brief description, date)

TEACHING ACCOMPLISHMENTS: (Academic and Extension teaching)

Areas of Specialization:

Courses Taught: (title, course number, date(s))

Students Advised:

Undergraduate Students: (advised to completion of degree, number per year)

Graduate Students:

Advised to completion of degree-major professor (student name, degree, and date)

Served on graduate committee (student name, degree, and date)

Materials Developed: (non-scholarship activity)

Courses Developed:

Non-credit Classes, Workshops, Seminars, Invited Lectures, etc.:
Honors and Awards:

SCHOLARSHIP ACCOMPLISHMENTS: (Including scholarship of teaching and learning, artistic creativity, discovery, and application/integration)

Publications, Exhibitions, Performances, Recitals:

- **Refereed/Adjudicated**: (i.e. books, book chaps., journals, proc., abstr., etc.; provide citations-author, date, title, publisher)

- **Peer Reviewed/Evaluated**: (i.e. journals, articles, proceedings, abstracts, etc.)

- **Other**: (reports, proceedings, papers, citations and references, performances)

- **Refereed/Adjudicated (currently scheduled or submitted)**: (provide citations)

- **Peer Reviewed/Evaluated (currently scheduled or submitted)**:

- **Presentations and Other Creative Activities**: (i.e. slide sets, web pages, video productions, etc., provide date and location)

- **Professional Meeting Papers, Workshops, Showings, Recitals**: (provide date and location)

- **Patents**: (provide title/description, patent number and date)

- **Grants and Contracts Awarded**: (provide principal and co investigators, title, sponsor, funding dates, amount)

Honors and Awards:

SERVICE:

- **Major Committee Assignments**: (National, State, District, County, University, College, Departmental and dates)

- **Professional and Scholarly Organizations** (including memberships, committee assignments, editorial services, offices held and dates)

- **Outreach Service**: (Including popular press, interview articles, newspaper articles, workshops-seminars-tours organized, Extension impact statements)

- **Community Service**: (non-academic unrelated to employment)

Honors and Awards:

PROFESSIONAL DEVELOPMENT: (workshops and seminars attended)

- **Teaching**:

- **Scholarship**:

- **Outreach**:

- **Administration/Management**:
# SUMMARY OF PERFORMANCE EVALUATIONS AND POSITION DESCRIPTIONS

**FOR**

Dr. John Smith, Department of __

## ANNUAL PERFORMANCE:

Annual performance evaluations by head of department and summary evaluation by dean

<table>
<thead>
<tr>
<th>Year</th>
<th>Year 1 2010</th>
<th>Year 2 2009</th>
<th>Year 3 2008</th>
<th>Year 4 2007</th>
<th>Year 5 2006</th>
<th>Year 6 2005</th>
<th>Year 7 2004</th>
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<td>Teaching &amp; Advising</td>
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<td>Scholarship &amp; Creative Activities</td>
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**Additional Notes:**

**Scoring key:**
1=Unacceptable performance
2=Below expectations
3=Meets expectations
4=Above expectations
5=Exceptional performance

## ANNUAL POSITION DESCRIPTION ALLOCATION:

Annual position description allocation of effort; the numbers are averages for fall and spring semester each year. The overall average is the average across the given years.

<table>
<thead>
<tr>
<th>Year</th>
<th>Year 1 2010</th>
<th>Year 2 2009</th>
<th>Year 3 2008</th>
<th>Year 4 2007</th>
<th>Year 5 2006</th>
<th>Year 6 2005</th>
<th>Year 7 2004</th>
<th>Overall Average</th>
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<tr>
<td>Teaching &amp; Advising</td>
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**Additional Notes:**
**ANNUAL PERFORMANCE EVALUATION FORM 1: EVALUATION OF FACULTY**

**INCLUDE DISCLOSURE OF CONFLICTS FSH 6240**

(Confidential)

Name: ________________________________  Evaluator(s): ________________________________

Department(s): ________________________________  ________________________________

**NOTE:** Faculty and administrator(s) are to review and address the objectives as stated on the previous year's position description.

<table>
<thead>
<tr>
<th>Position Description (PD) Responsibilities</th>
<th>PD %</th>
<th>Numeric Score*</th>
<th>PD% x score = total</th>
<th>COMMENTS INCLUDING ACCOMPLISHMENTS and IMPACTS WHEN APPLICABLE (Use back if necessary)</th>
</tr>
</thead>
</table>
| **TEACHING AND ADVISING**  
(FSH 1565 C-1; Strategic Action Plan Goal 1) |      |                |                     |                                                                                     |
| **SCHOLARSHIP and CREATIVE ACTIVITIES**  
(FSH 1565 C-2; Strategic Action Plan Goal 2) |      |                |                     |                                                                                     |
| **OUTREACH and EXTENSION**  
(FSH 1565 C-3, Strategic Action Plan Goal 3) |      |                |                     |                                                                                     |
| **UNIVERSITY SERVICE & LEADERSHIP**  
(FSH 1565 C-4 & C-5, Strategic Action Plan Goal 4) |      |                |                     |                                                                                     |

*Scoring Key*

5 = Exceptional performance  
4 = Above expectations  
3 = Meets expectations  
2 = Below expectations  
1 = Unacceptable performance

**Scoring Example:**

<table>
<thead>
<tr>
<th>PD%</th>
<th>Numeric Score</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teaching and Advising 50%</td>
<td>4</td>
<td>.50 x 4 = 2.0</td>
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<tr>
<td>Scholarship 35%</td>
<td>2</td>
<td>.35 x 2 = .7</td>
</tr>
<tr>
<td>Outreach &amp; Extension 10%</td>
<td>3</td>
<td>.10 x 3 = .3</td>
</tr>
<tr>
<td>Univ. Service &amp; Leadership 5%</td>
<td>3</td>
<td>.05 x 3 = .15</td>
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<tr>
<td>Unit Adm. Score (transfer total to box below)</td>
<td></td>
<td>3.15 = 3.2</td>
</tr>
</tbody>
</table>

Unit administrators and college deans may extend the weighted score one decimal place.  
**Rounding:** .5 and above round up; .4 and below round down.

(Continued on next page)
Interdisciplinary Activities: The unit administrator is responsible to solicit, discuss and consider evaluative comments from those interdisciplinary/center administrators listed in the faculty narrative attached to the position description used for this evaluation. All solicited comments are to be attached to this form. (FSH 3050 B-2, 3320 A-1 d, 3520 E-1, G-3, G-4 c, and 3560 C, E-2d).

Unit Administrator’s Attachment: A narrative on progress towards tenure, promotion, and/or continued satisfactory performance is to be completed by all evaluators for all faculty using separate pages and attach to this form (if there is a disagreement, see FSH 3320 A-1 e&f). Include the following areas, as appropriate: advancement, interdisciplinary activity, professional development and professional service (FSH 1565 B). If the narrative(s) is/are not attached the form will be returned to the unit by the college.

Unit Administrator Signature/DATE

Unit Administrator (joint appointments if applicable)/DATE

Faculty Comments:

Faculty Signature/DATE

Dean Signature/DATE

Dean’s Attachment: If there are any differences in any category of scoring between the department chair and college dean, a narrative shall be attached stating the reasons for these differences. The form with attachments must be returned to the faculty member for a second signature (if there is a disagreement, see FSH 3320 A-1 f). If the narrative is not attached the form will be returned to the College by the provost.

Second Faculty Signature (if applicable)/DATE

FSH 6240 Required Disclosure of Conflicts

You must complete this disclosure annually with your performance evaluation. If you have a conflict to disclose then you also will need to complete Form FSH 6240A. Likewise, if there is any change in your circumstance that may give rise to potential conflicts or eliminate potential conflicts previously disclosed, then you will need to complete Form FSH 6240A within 30 days of the change. University of Idaho FSH Policy 6240 Conflicts of Interest or Commitment is available at http://www.webs.uidaho.edu/fsh/6240.html. If you have any questions about the form or about specific potential or actual conflicts of interest, please contact your unit administrator or the Chair of the university’s Ethical Guidance and Oversight Committee. Disclose outside employment for compensation of more than 20 hours/week by completing FORM 6240 B – Disclosure of Outside Employment or Consulting for Compensation.

□ I have reviewed FSH 6240 and DO NOT have any conflicts of interest, conflicts of commitment or apparent conflicts to report. Please sign and date below.

□ I have reviewed FSH 6240 and DO have conflicts of interest, conflicts of commitment or apparent conflicts to report. Please, sign below, and fill out form FSH 6240A. Submit completed FSH 6240A to your unit administrator along with separate pages describing a plan to manage each conflict or apparent conflict.

Your signature below certifies that you have reviewed FSH 6240 regarding disclosure of conflicts, and that the information that you provide regarding disclosure of any conflict is accurate to the best of your knowledge as of the date of this document, and you commit to providing an update if a material change occurs in the information you have provided.

Faculty Signature/DATE

Unit Administrator/DATE
Name: ____________________________
Department: ______________________
Title/Rank: ________________________
Appointment: Academic Year ☐ Fiscal Year ☐ Other: ☐
Tenure Status: Nontenured ☐ Tenured ☐ Year Tenured: ☐

NOTE: Each category below (I-IV) may include the following areas, as appropriate: advancement, interdisciplinary activity, professional development and extramural professional service.

I. TEACHING AND ADVISING:

1. Instruction (FSH 1565 C-1 a; Strategic Action Plan Goal 1):
   a. Courseload:

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<th>Subject</th>
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   * Percentage/or credit(s) of responsibility for a team taught course.
   **See summary table on back page.

   b. Describe additional instructional responsibilities (course redesign; introduction of new delivery methods; involvement in course, program, and university level assessment of student learning outcomes; etc.):

   c. Provide a statement of your goals and objectives for teaching.

   Est. Instruction Percentage of Responsibility: Spring: _____ Fall: _____ Summer: ________

   2. Advising and/or Mentoring Students (FSH 1565 C-1 b; Strategic Action Plan Goal 1):

   Advisees (#): Undergraduate (Approx): Major ___ Minor ___ Certificates ___
   Grad (Major Professor): Doctoral ___ Masters Thesis ___ Masters Non-Thesis ___
   Mentees (#): Graduate ___ Undergraduate ___

   a. Other Service to Students (organization/program advisers, masters/doctoral committees as opposed to major professor, etc.):

   b. Provide a statement of your goals and objectives for advising and/or mentoring.

   Est. Advising and/or Mentoring Percentage of Responsibility: Spring: ____ Fall: ____ Summer: ____

   Total Teaching and Advising Percentage of Responsibility: Spring: _____ Fall: _____ Summer: _____
   (carry forward to summary table)
II. SCHOLARSHIP AND CREATIVE ACTIVITIES (FSH 1565 C-2; Strategic Action Plan Goal 2): [May include Teaching/Learning (FSH 1565 C-2 a), Artistic Creativity (FSH 1565 C-2 b), Discovery (FSH 1565 C-2 c), Integration (FSH C-2 d), and Scholarship of Outreach/Application/Engagement Activities (FSH 1565 C-2 e)]

Provide a statement of your goals and objectives for scholarship and creative activities.

Est. Percentage of Responsibility: Spring: _____ Fall: _____ Summer: _____
(carry forward to summary table)

III. OUTREACH AND EXTENSION (FSH 1565 C-3, Strategic Action Plan Goal 3): [May include Extension (FSH 1565 C-3 b) Distance Education (FSH 1565 C-3 c) Service Learning (FSH 1565 C-3 d) Cooperative Education (FSH 1565 C-3 e) Technology Transfer (FSH 1565 C-3 f)]

Provide a statement of your goals and objectives for outreach and extension.

Est. Percentage of Responsibility: Spring: _____ Fall: _____ Summer: _____
(carry forward to summary table)

IV. UNIVERSITY SERVICE AND LEADERSHIP:

1. Intramural Service (See FSH 1565 C-4 a):
   a. Provide a statement of your goals and objectives for intramural service.

   Est. Intramural Service Percentage of Responsibility: Spring: _____ Fall: _____ Summer: _____

2. Unit Administration (See FSH 1565 C-5):
   a. Provide a statement of your goals and objectives for unit administration.

   Est. Unit Administration Percentage of Responsibility: Spring: _____ Fall: _____ Summer: _____

3. Other Administration (See FSH 1565 C-4 b):
   a. Provide a statement of your goals and objectives for other administration.

   Est. Other Administration Percentage of Responsibility: Spring: _____ Fall: _____ Summer: _____

Total University Service & Leadership Percentage Responsibility: Spring: ___ Fall: ___ Summer: ___
(carry forward to summary table)
# Percentage of Responsibility Summary

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*Summer column should only be completed by faculty members who have a twelve month, fiscal year appointment. Academic year appointments (this includes all appointments less than 12 months) may attach a narrative for evaluation purposes with respect to their plans for additional activities undertaken in the summer that are outside their position description.

## Example Academic Year:

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<th>Annual (%)</th>
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## Example Fiscal Year:

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**Interdisciplinary Activities: Attach narrative.**

**If the above box is checked, the unit administrator is responsible to solicit comments from, and discuss with, the interdisciplinary/center administrators listed whether the interdisciplinary activities as stated are accurate. All solicited comments are to be attached to this form. (FSH 3050 B-2, 3520 E-1, G-3, G-4 c, 3560 C, and E-2d, and 3320 A-1 d).**

1. Faculty Member: I agree that this is a reasonable description of my responsibilities to the University of Idaho for the forthcoming calendar year.

   Signature of Faculty Member/Date

2. Unit Administrator(s) (including faculty with joint appointments when appropriate): I agree that this position description is a reasonable reflection of the stated expectations for progress towards tenure, promotion and/or continued satisfactory performance.

   Unit Administrator/Date

   Unit Administrator (joint appointments if applicable)/Date

3. College Dean: I agree that this position description is a reasonable reflection of the stated expectations for progress towards tenure, promotion and/or continued satisfactory performance.

   Signature of Dean/Date
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EXTERNAL REVIEWERS FOR:

Dr. John Smith

(1) Reviewer Name
Department
Title
Institution

Three to five peer reviews are required and must be obtained by following procedures in FSH Section 3560 E-2b. Please briefly describe this reviewer’s relationship to the faculty member. Peer reviewers should be individuals who are independent, objective and should not have a special relationship with the candidate either in a professional role such as research collaborator, major professor, supervisor, former departmental colleague, or in any other role that may involve a conflict of interest. Reviewers should be of significant professional standing, from a comparable institution to the UI and holding senior academic rank. Additional recommendations by the Provost for this process can be found on the website.

(2) Reviewer Name
Department
Title
Institution

(3) Reviewer Name
Department
Title
Institution

(4) Reviewer Name (optional)
Department
Title
Institution

(5) Reviewer Name (optional)
Department
Title
Institution
SAMPLE LETTER TO EXTERNAL REVIEWER

December 8, 2009

External Reviewer
1234 Thank you Lane
Faculty, ID  12345-1234

Dear External Reviewer:

Thank you for agreeing to serve as an external reviewer for the University of Idaho’s process in considering Dr. John Smith for promotion to the rank of Associate Professor. I recognize that completing an external review requires a considerable time commitment and I appreciate your willingness to serve in this capacity.

In your response, please confirm the nature of your acquaintance with the candidate and a review/critique of the faculty member’s scholarly activity (and other areas of professional activity), on the basis of standards in the discipline and the faculty member’s record.

Deans and chairs may also request on the basis of scholarly record, an assessment of the candidate’s recognition and standing among peers, whether their scholarship has had an impact on the discipline, whether it has earned for the candidate a national reputation, and whether the work collectively is likely to yield further significant advances in knowledge. Additionally you may request a judgment as to whether the candidate, in the quality and quantity of the scholarship produced, would be competitive for promotion/tenure at the reviewers’ institution and why. Additional information about this process should be reviewed on the Provost’s website.

The support materials to be supplied to reviewers will include the relevant context statements and department/college criteria, candidate’s vita, position descriptions for the relevant period, the professional portfolio, and up to four examples of the candidate’s scholarly work. These materials are selected by the chair after consultation with the candidate – i.e. the candidate may review the materials supplied to reviewers and suggest additions or deletions to the chair. College/department context statements and criteria for promotion and tenure are included as appropriate.

Your letter will be provided to departmental, college and university review committees and appropriate administrators; it will be held in confidence from the faculty member being reviewed during the review process. When all deliberations by the University have been completed, the essential content of peer review letters may be shared with the tenure/promotion candidate after every effort has been made to ensure the anonymity of the authors.

Thank you very much again for your time in this very important process.

Sincerely,

Dean
College of ___
Reviewer 1 Response Letter
Reviewer 3 Response Letter
Reviewer 4 Response Letter (optional)
Reviewer 5 Response Letter (optional)
Professional Portfolio: Steven R. Shook
Associate Professor of Marketing

Introduction

I appreciate the time and effort that you are taking to review my portfolio for consideration of my promotion to Professor at the University of Idaho. I have organized this portfolio into four distinct sections. The first section provides a context statement. The second section presents a statement of my personal teaching philosophy and a summary of my teaching effectiveness. The third section of the portfolio provides a statement of my research philosophy and a summary of my scholarship effectiveness. The final section overviews my leadership and service component. I then follow these four sections with a brief summary.

Context Statement

My employment at the University of Idaho (UI) began on December 1, 1998, when I was hired as an assistant professor in the Department of Forest Products in the College of Natural Resources (CNR). I was hired based on my teaching expertise in the field of marketing and my research expertise of forest products and associated building materials used in the residential and commercial construction industries. In 2004, my position evolved into a 51/49 percent joint appointment between CNR and the College of Business and Economics (CBE), respectively. In June of 2008, I was recruited by the CBE dean for a 100 percent appointment in CBE. I am a tenured member of the marketing area faculty in the Department of Business. I have taught several courses in CBE for eight years. In addition, I hold an adjunct appointment as an associate professor in the Department of Forest Products in CNR. I also held an adjunct appoint as an associate professor in the College of Engineering and Architecture at Washington State University from 2003-2008.

Since 2004, my teaching allocation has averaged 46.5% of my time, while scholarship activities have represented 32%. The remainder of my time has been divided among on-campus/extramural service (9.5%), advising (6.5%), extension and outreach (4.2%), and professional development (1.6%) activities. An annual breakdown of my employment responsibilities can be found in Table 1. My annual performance evaluations are provided in Table 2.

The current teaching component of my position is consistent with the expectations of the college, whereby I teach five course sections (3 credits each) per academic year. Prior to my 100% appointment to CBE, my teaching load would vary slightly due to changes in my scholarship allocation and outreach obligations. I typically teach upper-level undergraduate courses in the marketing area, which have included consumer behavior, marketing research and analysis, pricing strategy and tactics, and new product development. Over the period of review, I have also taught courses in CNR, including integrated natural resource planning (CNR's capstone course), forest products marketing, and forest products business management. For the relevant period under review, my student evaluations of the courses I have taught have averaged about 3.8 (out of 4) for the performance of instructor metric and 3.6 (out of 4) for quality of the course metric. With the exception of one course that was team taught with two additional instructors and included 99 students in one section, my teaching evaluation scores consistently rate higher than the average department and college scores (see Table 3). My rank on the performance of instructor student evaluation metric in CBE courses has never been lower than fifth among the 30+ department faculty members. I have twice ranked first among my faculty colleagues on this teaching performance metric.

My research can be described as integration of marketing and business applications to the natural and physical/engineering sciences, especially as it applies to the design, production, and sustainable use of wood-based materials. My research program consists of about 50% basic research and 50% applied research. The college expectation for research is that faculty members publish in a consistent manner approximately one refereed journal article per year within their discipline area. To date, I have 84 publications, of which 24 are refereed journal publications, 23 are peer reviewed publications, 32 are defined as other publications (largely focused on outreach and meeting the land grant mission of the university), and 5 professional meeting publications. My work has been published in regional, national, and international outlets. I have been directly involved with a total of 36
presentations at regional, national, and international meetings. I currently advise as major professor four graduate students (3 M.S. and 1 Ph.D.), as well as serve as a committee member on two additional Ph.D. committees. I have completed a total of 11 graduate students as major professor and 16 as a committee member. As a faculty member at Idaho, I have individually and with colleagues secured a total of 31 grants and contracts totaling $5.42 million, of which I have been ultimately responsible as principal investigator (PI) or Co-PI for approximately $1.05 million of this total. Collectively, I believe these productivity measures suggest that I have a mature and productive research program; they also demonstrate that I can successfully conceive, develop, carry out, publish, and provide outreach services within my area of research expertise.

**Service** to the institution is vital to a well-functioning organization. I believe that my performance in the area of service exceeds the expectations of the college and university promotion guidelines. I have been a member of 12 university-level committees, three of which I have chaired. I was a member of the University Vision and Resource Task Force, as well as a member of two college dean search committees (separate colleges). I have served on 13 college-level committees, both in CBE and CNR, and have served on numerous professional society committees. I am currently the editor of a refereed journal, and I have also served as an associate editor and a guest editor. I have refereed 79 manuscripts submitted to various peer reviewed outlets and have acted as a peer reviewer for six competitive grant submissions to various federal agencies. With regard to external service, I serve on the board of directors of two nonprofit organizations and often volunteer my time to various community and regional activities.

**Table 1. Allocation of employment responsibilities per position description for Steven R. Shook, 2004-2009.**

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<thead>
<tr>
<th>Responsibility</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>Average</th>
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<tbody>
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<td>Instruction/Teaching</td>
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<td>46.0</td>
<td>45.0</td>
<td>38.0</td>
<td>50.0</td>
<td>37.5</td>
<td>62.5</td>
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<td>5.0</td>
<td>5.0</td>
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<td>On-Campus/Extramural Service</td>
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<td>7.5</td>
<td>7.5</td>
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<td>Professional Development</td>
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**Table 2. Annual performance evaluation summary for Steven R. Shook, 2003-2008.**

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<th>Advising</th>
<th>University &amp; Extramural Service</th>
<th>Extension</th>
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<td><strong>Average</strong></td>
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**Notes:**

a Performance evaluation scale ranges from 1 (Unacceptable Performance) to 5 (Exceptional Performance), with a midpoint value of 3 (Meets Expectations).

b Appointment in 2003 resided 100% in the College of Natural Resources. From 2004 to 2007, appointment evolved into 51% College of Natural Resources and 49% College of Business and Economics, with tenure home in the College of Natural Resources; performance evaluations were reviewed and signed by both college deans during this time period. Beginning in 2008, tenure home converted to 100% College of Business and Economics.

**Teaching Philosophy**

My philosophy toward teaching has been largely influenced by my educational background and mentorship that I have received over the years. As an undergraduate at Purdue University, I pursued a B.S. in Forest Products and then subsequently added Forest Management as a second B.S. degree. My motivation for adding a second undergraduate degree was to better understand how forest management decisions affected wood quality and the ultimate utilization of wood-based materials by consumers. As my interest in the material properties of wood...
expanded, I chose to pursue an M.S. degree in Wood Science and Engineering at the University of Illinois, where I was exposed to a large number of research projects by my major professor; these projects involved highly engineered products that were in the last phases of commercial development. As a M.S. student, I was especially intrigued by the interaction required between marketing and engineering in generating successful product development projects. I also became interested in learning why some superior performing and seemingly affordable products failed after being commercially introduced into the market. Consequently, I decided to pursue a marketing degree at the Ph.D. level at the University of Washington.

Given my educational background in the natural, physical, and social sciences, in combination with excellent mentorship from various academicians and business people, I have become a strong advocate of the integrative and multidisciplinary approach to learning. I feel that students must understand how their area of expertise (i.e., major) fits within the broader framework of allied fields and society as a whole. For instance, changes in societal wants and needs (e.g., demands for greater product and service value) have had significant impacts across a wide swath of industrial sectors and consumer markets. Furthermore, the globalization of markets and harmonization in trade laws has radically changed the competitive landscape for businesses. I believe that students in business disciplines must be aware of the raw material resources, manufacturing, marketing, and consumption are interconnected so that they can craft astute and ethical decisions later in their professional career. Given my philosophy, my teaching is grounded in using tools and techniques that integrate and build upon concepts from a variety of discipline areas.


<table>
<thead>
<tr>
<th>Term</th>
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<th>Enrollment</th>
<th>Response Rate (%)</th>
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<th>Quality of Course&lt;sup&gt;c&lt;/sup&gt;</th>
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<td>59</td>
<td>3.8</td>
<td>3.8</td>
<td>1/35</td>
</tr>
<tr>
<td>Fall 2008</td>
<td>Bus/ForP 495</td>
<td>14</td>
<td>71</td>
<td>3.7</td>
<td>3.4</td>
<td>1/35</td>
</tr>
<tr>
<td>Spring 2009</td>
<td>Bus 324</td>
<td>38</td>
<td>68</td>
<td>3.8</td>
<td>3.7</td>
<td>3/34</td>
</tr>
<tr>
<td>Spring 2009</td>
<td>Bus 421</td>
<td>24</td>
<td>75</td>
<td>3.9</td>
<td>3.6</td>
<td>3/34</td>
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<tr>
<th>Average</th>
<th>Median&lt;sup&gt;f&lt;/sup&gt;</th>
<th>Average&lt;sup&gt;g&lt;/sup&gt;</th>
<th>Median&lt;sup&gt;g&lt;/sup&gt;</th>
<th>CBE Rank on Performance of Instructor&lt;sup&gt;d&lt;/sup&gt;</th>
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<tr>
<td>30.8</td>
<td>29</td>
<td>64.1&lt;sup&gt;h&lt;/sup&gt;</td>
<td>3.77</td>
<td>3.61</td>
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</tbody>
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<sup>a</sup> Five-point rating scale ranges from 0 (“lowest rating”) to 4 (“highest rating”).
<sup>b</sup> Question asked: Overall, how would you rate the performance of the instructor in teaching this course?
<sup>c</sup> Question asked: Overall, how would you rate the quality of this course?
<sup>d</sup> Rank is determined based on average performance of the instructor score relative to peers in home department.
<sup>e</sup> The low denominator in this ratio is due to a split into two departments that were then merged back together shortly after the split.
<sup>f</sup> NR 470 was a team taught course using three instructors.
<sup>g</sup> Reported average response weight is unweighted; weighted average response rate is 57.6%.

My teaching philosophy includes the development and execution of my own teaching proficiency; I believe that I need to be an effective instructor and responsive to student needs in order for my students to succeed in learning. I try to focus on student strengths and use active feedback mechanisms to aid students in academic and social growth. I attempt to meet student needs and be responsive to social, emotional, and physical variables that may impact the learning process and environment.
Additionally, my teaching and learning philosophy is intertwined with what I believe about students. First, students are individuals and they learn in different ways. As a teacher, it is my task to vary teaching approaches to maximize student learning potential. Second, college students are 24-hour individuals and their life is very dynamic; a student has much more happening in their lives than one particular learning situation (i.e., my course). In my opinion, effective learning occurs when I can understand and relate to the world of a student and be a partner in their learning experience. Third, students often have very different motives for advancing their level of education, and as their teacher I strive to adjust to individual motives in order to maximize learning. Finally, I believe that behavior as it pertains to learning is caused. I facilitate behavioral change in my students with my expectations of them. Quality, excellence, and depth are expected in all work of my students.

I believe that students should have a proficiency in a number of areas. These areas include [1] a depth and breadth of knowledge and skills requisite for their specific degree area, [2] the ability to communicate complex ideas in an understandable manner, [3] the ability to develop feasible solutions to problems using a logic-oriented approach, and [4] the ability to formulate the “right questions” and the “know how” to go about developing answers to these questions.

Few would argue that students need to obtain the knowledge and skills of their particular degree area. However, students also need to be able to clearly communicate their knowledge and skills to others. Communication embraces the skills of listening, information processing, and presentation (e.g., verbal, written, physical behavior). A wide variety of stakeholders are typically concerned with business decision-making. When students graduate and become professionals, I believe that they need to be able to communicate with this wide variety of stakeholders using methods that are appropriate to each group. To advance student skills in communication, I require students in all the courses that I teach to complete reports and presentations on a variety of topics aimed at different types of interest groups (e.g., internal employer reports, consulting reports, technical reports, business plans, strategic and tactical plans). I encourage students to use various media formats available to them as would be appropriate for the report or presentation that they are preparing/presenting. I also encourage students to synthesize portions of the text of their reports into graphical formats (e.g., figures, matrix tables) since it often forces the student to condense their material and concentrate on the root issues and concepts of their assignment.

I attempt to develop logic-based problem solving skills through my teaching methods. In my particular teaching area, there are often many pathways to develop a solution to a business or marketing problem. I stress this point repeatedly in my courses since often the obvious or “knee-jerk” plan is not the optimal plan to implement due to incomplete information, poor logic, various constraints, unintended consequences, etc. I use the case study method to some extent in nearly all the upper-level courses that I teach to foster the development of logic-based problem solving skills. Specifically, I require students to assess a case study, state the problem(s) raised by the case study, and then develop several solutions to the problem(s) using material that they have learned in my course, other courses, or from their own personal experiences. Students are then required to present and defend the logic behind their solutions.

Another skill that I attempt to instill in my students is the ability to ask the “right question(s).” It is literally impossible for any faculty member to teach a student all the information they would need to know for a particular situation due to the rapid changes in technology and the increasing volumes of available information. Thus, I believe that it is imperative that students develop the logic skill of formulating the right question(s) to ask, followed by developing the appropriate strategies and tactics to figure out the most efficient and effective manner in answering their question(s). For instance, student questions often tackle a symptom to a problem rather than a cause. Accordingly, I make an effort to facilitate the development of assessment skills by using a variety of source materials in my courses. These materials include academic and trade journal articles, case studies, databases, personal contacts (e.g., students call experts using a Delphi-like approach), Internet sources, among others. I spend considerable time with my students discussing the advantages and disadvantages of information collected from various source materials, how to critically assess the materials, and how to address conflicting information. This skill development tends to broaden the student’s perceived scope of available resources by semester’s end and results in stimulating classroom discussion and debate about information content, as well as its quality, accuracy, and utility in a given situation.
The structure of each of my courses is goal-oriented; each course syllabus states the course objectives and learning outcomes, and I clearly state the knowledge and skills that students are expected to become proficient in by the end of the semester. The course objectives are also tied back to the teaching and learning objectives adopted by CBE faculty. I use a wide variety of teaching techniques in the classroom, including traditional lectures, facilitated discussions, role-playing, and guest lecturers from business professionals. Communication in my classroom is supported by electronic means (e.g., MS PowerPoint slides, tablet laptop), web-based examples, and course notes. While textbooks are a component material in my courses, I also rely on current and/or seminal journal articles (academic and trade) and case studies as materials from which students can draw information.

I use a variety of methods to assess student proficiency in the topics embraced by my courses. Given the diversity of learning styles that students possess, I attempt to include at least three assessment methods in each assignment or exam. For instance, my exams typically consist of an equal balance of essay, short answer, multiple choice, and true/false situations. Assignments in all of my courses range from individual projects, semester-long group projects, written assignments, and individual and group presentations. I distribute clearly written project objectives and guidelines for each of my project assignments and provide students with examples of final work product.

Students’ group projects are assessed by their class peers. I then use the student peer evaluations in class as an instructional tool to discuss assessment objectivity when evaluating the work product of peers. I do not utilize pop quizzes in any of my courses, as I have found that they tend to bring a negative atmosphere of distrust to the classroom. However, I make it clear to students in my syllabi and in lecture that I have high expectations that they keep current with the course materials.

I take my responsibility as an educator seriously and spend considerable time preparing for each lecture. Although I have taught several courses multiple times, none of my courses consist of “canned lectures.” I stay current on the relevant issues in my field by attending conferences, seminars, and reading numerous academic and trade publications on a regular basis. My teaching materials are updated every summer with new information. I integrate what I learn into my courses so that my courses remain fresh and relevant. I also spend a considerable amount of time reviewing alternative teaching techniques, especially in the business education literature. I explore new methods to make the classroom environment dynamic for my students and bring real world case examples into the classroom to provide relevance for the material that I am teaching.

I believe that one of my greatest strengths as an instructor is my ability to tie my research directly into the courses that I teach. The breadth, depth, and international scope of my research allow me to put many theoretical marketing concepts discussed in class into practical application examples. As a result, I believe that the students can better comprehend the concepts being taught and see how they may relate to other real-world situations. To illustrate, I have integrated R&D research occurring on and off campus into the Product Development and Commercialization course (Bus/ForP 495). Work product generated from this course has been presented to industry, as well as entered in the VIEW Business Plan Competition.

In addition, my research and consulting experience regarding industry and firm level pricing behavior is used extensively in my Pricing Strategy and Tactics course (Bus 424). I believe that students appreciate an instructor who is active in conducting research in the topic being taught in class. As two students wrote in their teaching evaluations of my pricing course last semester:

"Shook is, by far, the best Marketing professor I've had thus far. He's very knowledgeable and has real-world experience in many of the areas he teaches (cha-ching, credibility!)."

"Shook is pretty straight forward professor which is what I like the most about him. He knows how to make us understand a concept and most importantly he always knows what he is talking about."
Given that I was employed as a marketing research professional prior to my career at the University of Idaho, as well as the fact that most of my research at Idaho is marketing research related, I feel that my greatest strength in integrating my research experience takes place in the marketing research course that I teach (Bus 421). This course can be rather cumbersome to teach given that it is qualitative, quantitative, and theoretical in structure, a combination not experienced in most undergraduate marketing courses. My perception is that marketing students often dread having to take the course. However, I believe that I have been remarkably successful in integrating my own experiences into the course so that students understand the issues that they will have to address when they become marketing professionals. In teaching the course, I attempt to take highly technical terms and issues and present them in a way that one would, in practice, present material to a client who has purchased marketing research services. The fall 2008 student evaluations of the marketing research course (n=29, 81% response rate) resulted in a score of 4.0 (out of 4) for the Instructor Performance metric and a score of 3.7 (out of 4) for the Quality of Course metric. I received these very high evaluation scores, as well as numerous positive written evaluation comments concerning the course, despite the fact that only 3 out of 29 students (~10%) received an "A" in the course.

I currently advise 62 undergraduate students. Typical advising responsibilities include assisting students with course choices, degree requirements, career advising, internship advising, among others. I have also acted in the advising capacity as a member on numerous graduate student committees during my tenure at the UI. I am currently the major professor for four graduate students (3 M.S., 1 Ph.D.), whom I manage through the graduate program in CNR via my adjunct status. I financially support my graduate students with stipends from grants and contracts that I have been awarded. I strive to provide the best academic experience for the graduate students that I teach in the classroom or mentor as a major professor/graduate student committee member. The expectations that I have for my graduate students are high; I expect my students to work diligently and be leaders in their field. I also expect them to collaborate with one another on their research projects. Upon completion of their degree, I expect each of my graduate students to be proficient in their specific subject area and that their research is of publishable quality.

My approach to graduate learning is to treat my graduate students as colleagues. By treating graduate students as colleagues rather than using a supervisor-employee task approach to teaching and research, I feel that I facilitate the student’s ability to ask the “right questions” and to develop their leadership skills. I also try to understand a graduate student’s interests and duties outside the UI. For instance, if a graduate student has family responsibilities (i.e., spouse and children), then I attempt to find ways to accommodate the student’s situation without compromising the quality of their education or research. I spend considerable time assisting graduates students (at least 10 hours per week, year round) in developing and progressing though their educational and research program so that it fits appropriately with their intended career objective(s).

Evidence of my continuous learning is revealed in the fact that I am designated as a Professional Certified Marketer (PCM), a professional certification program administered by the American Marketing Association. Like other examination-based certification programs for professional disciplines, the PCM designation is used to ensure to others that certified individuals have achieved proficiency and a high level of excellence in the marketing field. Additionally, the PCM program mandates continuous education as a requirement for recertification. I was the first academic in the Pacific Northwest to pass the PCM exam (June 2001), and I am the only faculty member at the UI with PCM certification.

Evidence of Excellence and Effectiveness in Teaching
Below I summarize several indicators of my teaching excellence and effectiveness.

- Recipient, Dean D. Thornton Faculty Fellowship, 2009-2011, which is awarded to a CBE faculty member for outstanding teaching and research competence.
- Recipient, UI Student Alumni Relations Board Apple Polisher Award, 2004 (university-level award).
• A total of 18 of 19 teaching evaluations of Instructor Performance over the relevant period of faculty performance review are greater or equal to department, college, and university averages (Figure 1).
• A total of 18 of 19 teaching evaluations of Course Quality over the relevant period of faculty performance review are greater than or equal to department, college, and university averages (Figure 1).
• My teaching evaluations on the Instructor Performance metric in CBE courses has never been ranked lower than fifth among the 30+ department faculty members. I have twice ranked first among my faculty colleagues.
• I have been certified as a Professional Certified Marketer by the American Marketing Association since June 2001. I have been recertified twice since obtaining my original certification.
• I have taught two different university approved and recognized (i.e., UCGE) capstone courses. I have team-taught the College of Natural Resources college-wide capstone course three times, with class sizes ranging from 65 to 99. I have also taught a product development and commercialization capstone course, which I created, that is incorporated into various degree programs across campus (aquaculture, entrepreneurship, food science, forest products). This course has also generated student teams for the UI Business Plan Competition organized by the UI entrepreneurship program, VIEW.
• I initiated (along with the Dean of CBE Jack Morris) discussions in the UI community regarding the establishment of a campus-wide entrepreneurship program. These discussions eventually led to the creation of the VIEW entrepreneurship program. I drafted the Business Plan Competition Guidelines and Rules for this program, as well as assisted in the development of the curriculum for the academic minor in Entrepreneurship.
• Marketing colleague Mike McCullough and I are actively engaged in the process of repackaging the Bus 421 (Marketing Research and Analysis) and Bus 428 (Marketing Management) into year-long integrated curriculum (a marketing capstone) with participation from local and regional businesses, a national research laboratory (INL), and two nonprofit organizations. In the past, these two courses have been taught as independent "silo" courses.
• I have been asked to teach summer workshops regarding the marketing of wood-based materials for the North American Wholesale Lumber Association numerous times.
• I have served as the faculty advisor for three teams that have competed in the VIEW Business Plan Competition. The majority of teaching here occurs outside the classroom where I work with the teams as they prepare their written business plans and oral presentations prior to the competition. One student team that I have advised has won the oral presentation competition and placed third in the overall competition.

![Figure 1. Student course evaluation of instructor performance (left) and course quality (right) for Steven R. Shook relative to department, college, and university averages.](image)

The University of Idaho highly values multidisciplinary and interdisciplinary teaching and research. This is reflected in the UI’s current Strategic Action Plan (Goal 2, Objective A: Increase Faculty Engagement in Interdisciplinary
Scholarship). I believe that the following examples demonstrate my effectiveness in the teaching arena as it relates to achieving the UI Strategic Action Plan's Goal 2A.

I have team taught on numerous occasions, including:

- **Bus/ForP 495 - Product and Process Development and Commercialization.** This course is part of a year-long course combination that is highly integrated with laboratory components in forest products and aquaculture (involving Drs. Gorman, McDonald, Cain). Food Science students have also participated in this course (involving Dr. Huber).
- **CNR 470 - Integrated Natural Resource Planning.** I have taught this college-wide capstone course in the College of Natural Resources on three occasions with faculty from the Departments of Fish and Wildlife, Range Sciences, Forest Resources, and Conservation Social Sciences.
- **Bus 421 (Marketing Research and Analysis) and Bus 428 (Marketing Management) have become integrated with one another.** I have been working with Mike McCullough, instructor of Bus 428, to plan and deliver this integrated sequence of courses that will essentially serve as the marketing area year-long, senior-level capstone.

**Scholarship**

**Research Philosophy**

Given my academic background and research expertise, my research program focuses on the integration of marketing and business applications to the natural and physical/engineering sciences, particularly as it applies to the design, production, and sustainable use of wood-based materials. My highly focused research agenda is a bit atypical for marketing faculty at peer business schools who generally do not focus on particular business or industrial sectors. My research program consists of about 50% basic research and 50% applied research. I have been motivated to raise external funds to support my research endeavors and graduate student stipends, publish scholarly papers on a consistent basis in refereed journals and other appropriate outlets so as to meet the UI’s land grant mission, and to present my research at regional, national, and international meetings on a regular basis.

My primary research areas can be broadly classified into two domains: one encompasses the related areas of product adoption, product diffusion, innovation, and consumer switching behavior (substitution) in wood-based product markets. The second domain focuses on analytical methods used to legally define markets, usually based on price factors, in antitrust and international trade disputes. The largest market for wood-based materials is the residential construction industry. This particular industry is considered to be extremely tradition-bound and unresponsive to the introduction of innovative, high quality, and cost-effective new products and processes. Much of my research focuses on the adoption and diffusion process in the residential construction industry as it applies to wood-based materials, as well as the factors that induce material switching behavior among contractors. The societal benefit of my research is to provide a better understanding of the adoption and diffusion process so as to facilitate the acceptance and more efficient use of wood-based materials.

Nearly all of my research has been multidisciplinary in nature, which is critical in attempting to obtain research funding from grant agencies. I work with faculty members within my department, other UI departments (e.g., Food Science, Forest Products), other universities (e.g., Oregon State University, University of Montana, University of Washington, Virginia Tech, Washington State University), as well as industry research entities (e.g., National Association of Homebuilders Research Center) to develop multidisciplinary approaches to research efforts.

My scholarship in application and integration is promoted through a number of pathways, including publications, conferences, seminars, corporate advisory board appointments, media interviews, and consulting. Application and integration of my scholarship in these areas has afforded me the opportunity to be on the leading edge of issues within my discipline area and to develop research agendas through interaction with non-academics.

My research has significant relevance to the forest products industry and to individuals and organizations developing public policy concerning the efficient, effective, and sustainable use of wood-based materials. My
research must be credible, rationale, and theoretically sound to be of value to industry and public policy makers. Credibility of my research, I believe, is gained through the publication of peer-reviewed and refereed articles. However, to disseminate my research more fully to those who can apply my results, I believe that it is important to present it at scholarly and industry conferences and to publish it in outlets that are much more geared toward technology and information transfer. In doing so, I attempt to meet the land grant mission of the university.

I also promote my scholarship by providing seminars to industry professionals concerning the marketing of forest products. I have served on the advisory boards of two companies, offering expertise in marketing and product/market development. Interaction with professionals in the industry has allowed me to advance my research agenda, as well as the agendas of other faculty. The network of associates that I have built up over the years within the forest products industry has provided me the opportunity to contribute to addressing complex problems. Furthermore, it has provided me a springboard in which I am now considered one of the foremost experts/observers in North America concerning the forest products industry.

As my CV indicates, I am regularly engaged in research-oriented consulting assignments. I consider consulting to be an integral part of any business-related research program since it provides a critical linkage between the academic and real world environments. Several benefits accrue from consulting activities. For instance, I have developed grant funded research projects based on my direct interaction with consulting clients. I have also used a tremendous amount of information that I have gained through consulting assignments to develop class teaching content. Another benefit of my consulting assignments, especially several recent assignments, has been my contribution to the understanding of important national and international trade and market development issues (e.g., Canadian-US softwood lumber trade dispute).

**Evidence of Excellence and Maturity in Scholarship**  
Below I provide a range of examples as evidence of my excellence in research competence and maturity in scholarship.

- Recipient, Dean D. Thornton Faculty Fellowship, 2009-2011, which is awarded to a CBE faculty member for outstanding teaching and research competence.
- I have produced a total of 84 publications. This includes 24 refereed publications, 23 peer reviewed publications, and 32 other publications such as trade journal articles and working papers and other outreach-oriented work products, and 5 professional meeting publications.
- According to publication productivity statistics maintained by the College of Business and Economics, I rank second among all college faculty members in the number of peer reviewed publications (13) between July 1, 2004, to June 30, 2009, as well as second in total number of publications (37) over the same time period.
- I have recently published three manuscripts in the prestigious *Canadian Journal of Forest Research*. This top-tier journal is published by National Research Council of Canada, Canada’s equivalent to the US National Science Foundation.
- A total of 36 research presentations have been made to international, national, and state audiences. Presentations of my research have been made in Canada, Italy, New Zealand, Portugal, Ukraine, and Wales. Several of my graduate students have participated in preparing and making these presentations.
- I have been awarded a total of 31 research grants and contracts totaling more than $5.4 million, being personally responsible (i.e., ultimate budget authority as PI or Co-PI) for slightly more than $1.05 million of this total.
- My research funding has been obtained from a variety of sources, including the National Science Foundation, US Department of Defense (Office of Naval Research), US Department of Agriculture, Idaho Forest Products Commission, multiple industry sources, private equity firms, and legal firms.
- I am currently the major professor for four graduate students (3 M.S., 1 Ph.D.). I also currently serve on the graduate committees of two Ph.D. students. I support my graduate students from awarded project grants.
I have completed 11 M.S. graduate students as major professor and another 16 as a graduate committee member. I have served on Ph.D.-level graduate committees for students located at the University of British Columbia and Oregon State University.

During the summer of 2009 I assumed the Editor position for the *Journal of Forest Products Business Research*, an international journal published by the Forest Products Society. I have been an Associate Editor for this particular journal since 2004.

I have conducted original research in Canada, Japan, and Ukraine, all of which has been published and presented at professional meetings.

My research in product substitution and market definition has been used in trade analyses by the US International Trade Commission, NAFTA review panels, and the World Trade Organization.

My research in market structure and competition in the forest products industry was recently used by plaintiffs in an antitrust lawsuit against all eleven North American manufacturers (e.g., Georgia-Pacific, Louisiana-Pacific, Potlatch, Weyerhaeuser) of oriented strandboard [Case Number 06-CV-826-PD, US District Court for the Eastern District of Pennsylvania]. This lawsuit ultimately resulted in a $126 million settlement by the manufacturers (www.osbsettlement.com)

I consider that two types of evidence exist to demonstrate that one has developed a mature research program: outputs and outcomes. Outputs in the academic arena are much like stamp collections or trophies, whereby evidence of performance is shown by number of publications and presentations, total number and value of grants and contracts, number of graduate students, etc. Hence, a simple “count” becomes the measure of performance. I have presented research outputs above that I believe provide evidence that I have developed an on-going and successful research program.

However, I feel strongly that a more important indicator of a well developed and mature research program is evidenced in outcomes that meet the land grant mission of the institution. I believe that my research is highly valued within the industry that I specialize. I also believe that my academic peers and industry professionals view that I am one of the foremost experts concerning the North American forest products industry, which is an enormous industry with regard to its size, tax receipts generated, and the number of workers employed in the sector, and certainly an important industry within Idaho and the Pacific Northwest region.

The outcomes of my research that provide an indication that it is well developed are evidenced in the following:

- 32 major consultancies that build on my past research experiences with clients ranging from the forest industry (e.g., Weyerhaeuser), financial industry (e.g., BankBoston; Michael S. Dell Capital), industry associations (APA-Engineered Wood Association), and government agencies (USAID).
- Service on two corporate advisory boards, one located in Washington and the other in Texas.
- Recognition from my academic peers to serve as Editor of the *Journal of Forest Products Business Research*.
- Employed as an expert in the Canadian-US softwood lumber trade dispute, where I presented research to the US International Trade Commission, NAFTA Dispute Panel, and the WTO.
- Employed as an expert in a recent antitrust lawsuit brought against the structural wood panel industry.

As previously mentioned, the UI highly values multidisciplinary and interdisciplinary teaching and research. I believe that the following examples demonstrate my effectiveness in the research and scholarship arena as it relates to the UI Strategic Action Plan’s Goal 2A.

- Dozens of publications authored with colleagues from such institutions as Louisiana State University, Oregon State University, Penn State University, Purdue University, University of Agricultural Sciences in Vienna, University of Helsinki, University of Illinois, University of Montana, University of Washington, Virginia Tech, Washington State University, among others.
• I have been attempting to increase the involvement of College of Business and Economics faculty in research. For example, I have worked with Michele O'Neill in securing a grant concerning price cointegration, Terry Grieb as a graduate student committee member on a project concerning price discovery in the forward futures market for softwood dimension lumber, and Ray Dacey as a graduate student committee member on a qualitative research project concerning the structure, conduct, and performance of logging contractors.

• Appointment, Adjunct Associate Professor in the Department of Forest Products at the University of Idaho.

• Appointment, Adjunct Associate Professor in the College of Engineering and Architecture at Washington State University (2003-2008).

Leadership and Service

University of Idaho guidelines for promotion to full professor (FSH 1565 D-2c) stipulate that the candidate is "expected to play a major role of leadership in the development of academic policy, through service to the university and/or his or her profession." I have been very involved as a university citizen and believe that my active participation and leadership on a number of university committees and program areas, as well as my professional service activities, exceed the leadership and service requirement for promotion to full professor. Below I outline these service and leadership activities that I have been involved with as a faculty member at the University of Idaho.

University Level Committees
Admissions Committee, 1999-2002, committee meets twice a month including summer months (Chair, 2000-02)
Curriculum Committee, 2007-2008
Grievance Committee for Student Employees, 1999-2000 (Chair, 1999-2000)
Dean Search Committee, College of Business and Economics, 2006
Dean Search Committee, College of Natural Resources, 2001
Director Search Committee, VIEW Entrepreneurship Program, 2006
Information Technology Committee, 2003-2006
Intellectual Property Committee, 2002-04 (Chair, 2002-03)
International Affairs Committee, 2003-2006
University Judicial Council, 2009-present
University-Level Promotions Review Committee, 2009
UI Vision and Resource Task Force, 2004

College Level Committees
College of Business and Economics, University of Idaho, Moscow, Idaho:
Executive MBA Assessment Committee, 2008-present
Faculty Fellowship Committee, 2007-2008
Faculty Search Committee, Marketing tenure track position, 2007
Scholarship Committee (Goal #2 Strategic Plan), 2007-present

College of Natural Resources, University of Idaho, Moscow, Idaho:
CNR Curriculum Committee, 2007-2008
CNR Academic Redesign Committee, 2002-03
Faculty Council Representative (alternate), 2004-2007
Faculty Search Committee, natural resource economics tenure track position, 2003
Staff Search Committee, Chief Financial Officer of CNR, 2006
Master of Natural Resources Program Committee, 1999-2002
Scholarship and Awards Committee, 1999-2008
Faculty Search Committee, forest operations tenure track position, 2000
Faculty Search Committee, wood composites tenure track position, 2001
College of Agriculture and Life Sciences
Faculty Search Committee, natural resources economist tenure track position, 2003
Faculty Performance Review Committee (of a tenured faculty member), 2008

Washington State University, Pullman, Washington
College of Engineering and Architecture, Search Committee, sustainable composites faculty position, 2007
Wood Materials Engineering Laboratory, Search Committee, extension faculty, 2002

Professional
Accreditation Committee, Society of Wood Science and Technology, 2002-2008
Electronics Communication Strategic Issues Standing Committee, Forest Products Society, 2002-04 (Chair, 2003 and 2004)
Market Potential Committee, Forest Products Society, 2002-2006
Strategic Issues Committee, Forest Products Society, 2002-2007
Publication Committee, Forest Products Society, 2002-2005
Wood Award Selection Committee, Forest Products Society, 2000

Editor and Reviewer Service
Editor, Journal of Forest Products Business Research, 2009-present
Associate Editor, Journal of Forest Products Business Research, 2004-2009
Senior Editor, Ei Paper Village (owned by Elsevier Science), 1999-2002
Editorial Review Panel, South-Western/Cengage Learning, pricing textbook, 2009
Guest Associate Editor, Forest Science, 2007
Manuscript Reviews - I have participated as a peer reviewer for 79 refereed journal manuscripts.
Proposal Reviews - I have participated as a competitive grant proposal review on six occasions.

Summary

Eight factors are explicitly listed in the University of Idaho Faculty Staff Handbook (FSH 1565 D-2c) as criteria to be used for determining a candidate’s promotion to the rank of Professor. These include:

1. Rank requires doctorate degree.
2. Candidate will exhibit intellectual and academic maturity.
3. Candidate will demonstrate effective teaching.
4. Candidate will demonstrate the ability to organize and carry out, and direct significant scholarship in major field.
5. Candidate will demonstrate major scholarly contributions to field, evidenced by several quality publications and/or highly productive scholarship in one or more of the areas of teaching, discovery, artistic creativity, and application/integration.
6. Candidate will have charge of courses.
7. Candidate will supervise research.
8. Candidate will play a major role in the development of academic policy, through service to the university and/or profession.

I consider that the information that I have provided in this portfolio clearly addresses each of these eight criteria, and that it demonstrates my qualifications for promotion to Professor at the University of Idaho.