✓ Information Included in This Toolkit

- Items needed to process your merit or promotion advancement
- Tips for a successful review
- How your CV is entered in MyInfoVault (MIV) System
- Template for writing your Candidate Statement
- Extramural letters information-Requirements if you are eligible for a promotion/merit that requires letters of reference
- Contributions to jointly authored works- What do you need to provide?

✓ Items Needed to Process Your Advancement

Updated Curriculum Vitae (CV)

Include all publications, presentations, teaching activities, service, awards/honors and grants since your last review.

Candidate Statement

A Candidate Statement is optional, but highly encouraged. It is your narrative and should highlight your greatest accomplishments in all review criteria for your series.

Diversity Statement

A Diversity Statement is optional, but highly encouraged. The statement is your narrative and should describe your impact on the University's mission of equity, diversity and inclusion. For more information on writing a diversity statement, click here.

Teaching Evaluations

Provide copies of any teaching evaluations from special lectures & medical student teaching that you've taught outside of the Department/University. The Department will provide any evaluations for teaching within the department.

Contributions-Publications

Describe your contributions to the work resulting in co-authored publication, keeping in mind the importance of demonstrated intellectual leadership.

Tips for a Successful Review

Best Practice-Start Early

Submit your updated CV and required materials well in advance of your department's deadline.

Best Practice- Know Your Review Period

The review period includes all achievements and activities after those counted for advancement to the current step. Include activities that only occur during your review period in your candidate statement and in your dossier. Consult your department representative or the department of Academic Personnel if you need more information about your review period.

Best Practice-Limit your Candidate Statement to 5 pages

Guidance for writing your statement is provided in this toolkit

Best Practice-Service Activities

Provide an end date for all service activities. If the service is still active, then provide the end of the current review period as the end date. Rather than using present or current as an end date, service will be updated with each action to represent active service for the review period. For dossier reviewers to better understand the workload and your time devoted to outside professional service, you will be asked to provide the service dates and actual number of journal manuscript reviews for *ad hoc* journal reviews and journal reviews as part of editorial board service.

Step Plus Guidelines: For more information on the Step Plus System, click here

1.0-step= A balanced record, appropriate for rank and step, with evidence of a meritorious record of achievement in all areas of review.

1.5 step= A 1.5-step advancement requires a meritorious record with outstanding achievement in at least one area of review.

2.0 step= A 2.0-step advancement requires a meritorious record in all areas of review, with outstanding achievement in at least two areas of review.

Please contact Academic Personnel with any questions

✓ <u>MIV Categories -</u>How Your CV is Entered in MyInfoVault (MIV)

Extending Knowledge
(Audience: General Public)

*Activities in this section represent information presented or provided to the general public rather than to other health professionals.

<u>Broadcast, Print or Electronic Media</u>

Examples of, but not limited to include:
• CD ROM
• Podcast
• Websites (YouTube)
• Fact sheets, Leaflets, Magazine Articles, Newspaper Articles (Sacramento Bee, Sacramento Magazine)
• Television interviews, Video (NPR)

<u>Workshops, Conferences, Presentations and Short Courses</u>
• Examples include: Presentations at support groups or lectures at community events

Grants & Contracts
*Includes active, submitted and completed grants. CV should include the following information:

• Total amount of the grant
• Start date and end date of the grant (if submitted, include the submitted date of the grant)
• Your role –Note: If you are not the PI, please provide the name of the PI
• Roles include: Principal Investigator, Co-Investigator, Assistant Researcher, Collaborator, Instructor, Trainer, Other
• Funding agency
• Grant number

List of Evaluations
(Audience: Students or Health Care Professionals at UC Davis)

*The rating used for teaching evaluations reflects the "overall teaching" score and includes the scale in the format of low to high. Evaluations from other departments within the University may be included.

Evaluations should include: Quarter or Year, Course number, Course title, Total Responses, Instructor Score, Course Score and a link to the evaluation.

Publications

(Audience: Peers)
*In the School of Medicine this category includes peer reviewed publications and presentations given to peers and other health professionals. Lectures to students or the general public should not be included in presentations.

- Abstracts
- Alternative Media (video series, video lecture, virtual patient cases)
- Books Authored
- Book Chapters
- Books Edited
- Books Reviewed
- Journals (peer reviewed)
- Letters to the Editor (also includes replies to letter to the Editor)
- Limited distribution (not available to general public)
- Patents
- Presentations (poster, oral, PowerPoint to peers and other health professionals including other universities)

Service

*Service within the School of Medicine, Campus and system wide, other University Service, other Non-University service; including committee and administrative activities.

This category also includes Editorial Board and Advisory Board Service, Journal reviewer, Professional membership and volunteer service. Dates of service are needed in order to update MIV. The use of "present" as an end may not be included.

Please note that for Editorial Board service a hyperlink to the list of the editorial board is required to verify membership. For dossier reviewers to better understand the workload and your time devoted to outside professional service, you will be asked to provide the service dates and actual number of journal manuscript reviews for *ad hoc* journal reviews and journal reviews as part of editorial board service.

Teaching

(Audience: Students within the School of Medicine: Medical Students, Residents, Fellows)
*This category is used for all teaching including mentorship and curricular development for students within the School of Medicine at the University of California, Davis. Lectures to other Universities would be included in the "Presentations" section of Publications

- Contact hours (lecture, discussion, lab and clinic hours with trainees for the quarter and year
- Courses
- Curricular Development
- Lectures/Seminars/Labs (provided within the School of Medicine)
- Special Advising
- Student Advising
- Thesis Committees
- Undergraduate Mentorship: Students for whom the candidate provided significant mentorship, example: 099 or 199 mentored to award
- Trainees: Fellows (post-doctoral, clinical, post-doctoral scholar, research Doctoral Candidates, formal mentorship or supervision)

✓ Candidate Statement Template

To aid in the evaluation of my merit/promotion action from [**Current Rank, Current Step**] effective July 1, **20XX**, I am providing detailed descriptions of my research and or clinical, educational and service activities with an emphasis on the period since the last promotion, merit, or appointment (**20XX**).

I feel that I can provide evidence of a meritorious record of achievement in all areas of review.

or

I feel that I can provide evidence for a meritorious record, with outstanding achievement in at least one area of review.

or

I feel that I can provide evidence for a meritorious record in all areas of review, with outstanding achievement in at least two areas of review.

A. **RESEARCH: [** Research should be replaced with SCHOLARLY & CREATIVE ACTIVITY for the HSCP series. Information about HSCP series requirements can be found here**]**

Since my last review cycle in 20XX, I have continued to make significant progress in research endeavors resulting in publication. I have produced **number** (**X**) original papers: **number** (**X**) have been published, and **number** (**X**) other papers in press. I have also written **number** (**X**) book chapters (**X** submitted and **X** *in press).* Key research projects are described in more detail below (***Detailed Research Progress*** section).

I have **number** (**X**) active grants at present. I have garnered extramural funding including a new **NIH, DOD, NSF** etc. grants including **grant number and dollar amount** direct costs for five years on the topic of **amazing science**. I also received a new **grant agency, number and dollar amount** on which I am the **role**. I also developed a collaborative project with **team members,** which resulted in a funded project through the **grant agency, number and dollar amount**.

I am serving as a sponsor for a **Jane Smith's pre/postdoctoral fellowship** from the **grant agency, number and dollar amount.**

B. **CLINICAL:** Since my last review cycle in 20XX, I have engaged in patient care related to XXX. During this period, I have developed new **approaches, protocols etc.** that have **describe benefit. Describe impact for clinical sites served** (e.g. VA, Primary Care Network, external clinical locations).

C. TEACHING AND MENTORING: Since my last review, I have been actively engaged in teaching in the (**Medical School, Graduate Groups/Programs, Bedside, Residency program etc.**) and (**if applicable**) in an *ad hoc* capacity for various on campus programs.

I serve as IOR (or Co-IOR) (instructor of record) for **section** of the **course name**. In addition to course coordination, I give **X lectures** covering **topic areas**. The course evaluation metrics were (X out of X) indicating that "… ", as supported by comments such as "…".

My teaching innovation during this time included … and an important impact (describe) on the curriculum, enabling students to more successfully … (describe).

I was ranked **# X** in the pre-clerkship **course** curriculum by students on the Educator Rank report this past year. (**objective measure**)

I was a lecturer in "**course**" **during** X quarter, **20XX**. This is a core course in the **Program** that is designed to provide students with **brief description**. I gave lectures on "**topic areas**" and comments from the students were very positive. The average student ratings for my lectures were 4.5 on a 5 point scale (**objective measure**).

I am a member of the **group** and serve as a **role (**i.e. faculty advisor).

I am currently mentoring **describe students/trainees and any of their substantial achievements. List membership/chair on any thesis/dissertation committees.**

D. SERVICE (UNIVERSITY AND PUBLIC): Since my last review, I have substantially expanded my service dossier. My service has merited honors including **describe honors/awards/prizes.** Highlights of my service activities are outlined as follows:

Describe **community** service/engagement.

At the level of the ***University of California System***, I serve as **describe roles and accomplishments**.

At the ***University*** level, I serve as **describe roles and accomplishments**. I serve as a **role (**i.e. **graduate advisor,** faculty advisor) in the **group**.

Within the ***School of Medicine (SOM)***, I serve as **describe roles and accomplishments**.
At the ***Department level***, I engage in service **describe roles and accomplishments**.

E. PROFESSIONAL COMPETENCE
I serve on the editorial board for the **Journal**, the advisory board of the **Association**, as a member of the **Consortium**, **Committee**, **Review board, study section, agency, journal** (add things like honors, keynote addresses, serving on NIH review committees, etc.).
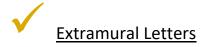
Research Impact: There are multiple **objective indications** of widespread impact of ongoing research in the Lab. Since my last review, I was invited to give **number** (**X**) scientific presentations at various National and International venues. I engage in considerable invited intramural and extramural scientific service. A few examples include my service on the advisory board **of agency** as a member of the

group/agency, the **group/agency** committee, and engagement in peer review for **group/agency/journal.**

F. CONTRIBUTIONS TO DIVERSITY: I have participated in activities related to: 1) Increasing the participation of historically under-represented groups in science/nursing/medicine. This could include involvement in outreach, tutoring, or other programs designed to remove barriers facing women, minorities, veterans, people with disabilities or other individuals who are members of groups that have been historically excluded from higher education. 2) Develop approaches for teaching, advising, and/or mentoring of students who are under-represented or under-served in higher education/academic medicine. 3) Utilizing or development of pedagogies that address different learning styles and/or learning disabilities. 3) Contributing to or leading research that contributes to understanding the barriers facing women and under-represented minorities in higher education/academic medicine or that otherwise contributes to diversity and equal opportunity, including production of scholarly works that reflects culturally diverse communities or voices under-represented in higher education/academic medicine. 4) Developing clinical care models, innovation or approaches that are intended to benefit underserved patients.

Note: The diversity statement is a narrative and should describe impact.
Example statement can be found by clicking here

G. DETAILED DESCRIPTION OF RESEARCH/CLINCAL/TEACHING PROGRAMS: Include any information that is applicable.

✓ Extramural Letters

Guidelines:

If you are eligible for an action that requires extramural letters of reference, please provide a list of referees that are at your proposed rank or higher. Please click here for information on the specific requirements for letters of reference for your series.

Your list of referees should include a combination of individuals in the medical profession and/or in your specific field of expertise whom you may know, as well as "Arm's Length Referees" .

Arm's length referee is defined as follows:
- Someone who is not a past collaborator (PI on a shared grant, co-author, etc.)
- Someone who has not served as a past mentor, advisor or supervisor
- Someone who is not a friend or previous/current co-worker

You are welcome to use the following table to organize your list, with the name, title, University, email address and expertise of each individual.

1	Name	
	Title	
	University	
	Email Address	
	Expertise	
2	Name	
	Title	
	University	
	Email Address	
	Expertise	
3	Name	
	Title	
	University	
	Email Address	
	Expertise	
4	Name	
	Title	
	University	
	Email Address	
	Expertise	

5	Name	
	Title	
	University	
	Email Address	
	Expertise	
6	Name	
	Title	
	University	
	Email Address	
	Expertise	
7	Name	
	Title	
	University	
	Email Address	
	Expertise	
8	Name	
	Title	
	University	
	Email Address	
	Expertise	
9	Name	
	Title	
	University	
	Email Address	
	Expertise	
10	Name	
	Title	
	University	
	Email Address	
	Expertise	

✓ <u>Contributions to Jointly Authored Works</u>

Please describe your contributions to the work resulting in co-authored publication, keeping in mind the importance of demonstrated intellectual leadership. Examples include activities such as developing the concept, inventing or applying novel analytic techniques. If possible, please avoid copying and pasting your contribution(s). Please avoid providing a simple estimate/percent of your contribution.

Year	Journal Title	Contribution	Significance of Research (Optional)

Year	Journal Title	Contribution	Significance of Research (Optional)