STEP PROCESS REVIEWS
IN
MSU EXTENSION

APPLICATION GUIDELINES, REVIEW PROCEDURES, AND PORTFOLIO EXPECTATIONS

Updated – August 2021

CONTENTS

The Step Process is a career progression system that provides longer term, in –depth performance feedback, professional development and career guidance for academic staff. All MSU Extension academic staff employed at 50%FTE for three-years or longer are subject to the Step Process. Step I is granted upon employment of an eligible academic employee. Step II status is required and granted upon successful completion of both the three-year and final (to be completed by the sixth fiscal year of employment) portfolio reviews. Application for Step III status is optional and may occur following attainment of Step II status.

The Step Process does not apply to administrative staff in these categories: Extension Associate Director, Extension Institute Directors, Extension Associate Institute Directors, Extension District Directors. Individuals in these groups are subject to the Extension 5-Year Administrator Review Process.

The portfolio review is an opportunity to demonstrate the progress a MSU Extension academic staff member has made in understanding the role of an Extension academic employee, developing the requisite, progressive skills to carry out this role and demonstrating the long-term impacts of the work.

Completion of any level of the Step Process is not a guarantee of on-going employment and provides no additional assurances or alters, in any manner, conditions of employment beyond the terms and conditions of the respective employee's applicable agreement, either fixed-term or continuing employment.

For additional information on Fixed-Term or Continuing employment status, refer to the Portfolio Review for Fixed-Term Academic Staff and the Continuing Employment System document available on the MSU Extension Organizational Development Site under Human Resources /Performance Management.

Note that Fixed-Term staff completing the final Step II review successfully does not move the employee to a continuing classification. The position remains fixed-term.

Questions on the Step Process may be directed to the appropriate Institute Director or Associate Institute Director, District Director, MSU Extension Human Resources Office or the Extension Associate Director.

For purposes of this document, an academic staff member, regardless of title, submitting a portfolio for review will be referred to as "Educator".

Submission and review processes for Step II and Step III are done electronically via systems developed specifically for the step processes. Forms and instructions for using these systems are available on the Organizational Development site under Human Resources/Performance Management.

The Professional Portfolio Review application package for either a Step II or Step III submission consists of a single, pdf document containing information, including all supporting documentation, as outlined in this document.

STEP II – REQUIRED FOR ALL ACADEMIC EMPLOYEES

MSU Extension policy requires each academic staff member with a fixed term or continuing employment appointment of 50%FTE or more to submit a Step II Portfolio that demonstrates long term performance, professional development, and other achievements at three-fiscal years. If the review committee feels an Educator's three-year Step II portfolio submission is exceptionally done, it may be suggested to the Educator that application for the final portfolio review can be made prior to completing six-fiscal years of service. Any eligible employee may submit the second Step II Portfolio early, at four or five fiscal years of employment, but must submit the Final Step II Portfolio by six-fiscal years of employment.

An employee electing to submit a Final Step II portfolio prior to a six-year submission must submit a letter of intent by August 1st of the year prior to the desired review period. The letter of intent should be emailed to the employee's Institute Leadership (Institute Director & Associate Institute Director), District Director (for off-campus staff) and Extension Human Resources. Approval by the Institute Leadership is required for the applicant to be eligible for an early submission.

Employees who have successfully completed the Final portfolio review of Step II and are returning to employment with MSU Extension after a break-in-service or who have exceptional experience in the field may request the waiver of the Step II 3-year and/or Final Portfolio review prior to hiring or rehiring into Extension.

STEP II APPLICATION & PROCESS TIMELINE

1. **By August 1st**
   a. Employees electing to submit a Final Step II portfolio in advance of the six-fiscal year requirement should email a letter of intent to the Institute

Leadership, Extension Human Resources, and District Director (for off-campus staff).

2. **By August 30th**

   a. Notification of approval/disapproval of early submission is provided to any applicant who has submitted a letter of intent.

3. **By December 1st**

   a. The Educator will seek an initial review of the portfolio from the Educator's Institute Leadership and/or District Director so the portfolio can be fully reviewed and guidance can be provided.

4. **By March 1st**

   a. The educator submits the portfolio application via the Step II Site.

5. **By April 1st**

   a. The designated Professional Extension Association representative will review the application portfolios and add their feedback via the Step II Site.

6. **By April 15th**

   a. The District Director or Supervisor reviews the application portfolio and submits feedback via the Step II Site.

7. **By April 30th**

   a. The Institute leadership reviews the application portfolio and the District Director's feedback then adds their feedback.

8. **May through June 15th**

   a. The review committee will meet annually to review the Step II portfolio submissions and submit results to the Extension Director who will review and provide final approval to move forward as suggested by the Review Committee. Results of the portfolio review are then forwarded to the Dean and Provost offices for approval.

9. **By July 1st**

   a. The individual Educator is notified of the outcome of the review.

10. **October 1st**

    a. Any applicable base salary increase is effective October 1st of the year of the successful Final Year review.

Off-campus staff - The Review Committee consists of a member of the Institute Leadership, District Director and Associate Director.

On-campus staff - The Review Committee consists of a minimum of three individuals including a member of the Institute Leadership, the District Director assigned to the Organizational Development team and Associate Director.

ROLES OF THOSE INVOLVED IN STEP II

- **Educator**: Complete and submit a Step II Portfolio.

- **District Director**: Provide guidance around completion of Portfolio, review final portfolio, and submit feedback using Step II Site, as part of the Committee, will vote on the outcome of the review process for assigned Educators.

- **Institute Leadership (Institute Director/Associate Institute Director)**: As defined within each Institute, each of these responsibilities may be assigned to one or both of these individuals: Review early submission letters of intent for approval, provide guidance around completion of Portfolio; review portfolios and submit feedback; as part of the Committee, will vote on the outcome of the review process for Educators in Institute or those who were previously in the Institute but have since moved to Administrative roles such as District Director, Associate Director, Director, etc.

- **Association President/Representative**: Review portfolios of Educators as assigned and provide feedback via Step II Site.

- **Director's Office**: Review portfolios, provide feedback electronically and, as part of the Committee, vote on the outcome of the review process for all Educators.

- **MSU Extension HR Manager or an appointed designee**: Facilitate the process as a non-voting resource.

STEP II PROCESS & POSSIBLE OUTCOMES

In reaching a judgment regarding academic staff employment status the committee can make one of two choices following review of the individual's required third-year or sixth-year Final application: 1) continue present status, or 2) dismiss the employee.

In the case of an applicant who has been approved to complete a Final Step II review prior to the sixth-fiscal year of employment, the committee can make one of two

choices: 1) successful, or 2) unsuccessful. Unsuccessful Final portfolio reviews completed prior to the required 6-year (at four or five fiscal years) will result in no change to employment status and the employee will need to resubmit a portfolio for review by the required sixth-fiscal year.

FIXED TERM EMPLOYMENT

A successful Final Step II portfolio review places the fixed-term academic staff in good standing for reappointment and step promotion but does not guarantee reappointment.

Unsuccessful Final year portfolio reviews completed at the required 6-year mark will result in termination. Fixed term employees will be given a 60-day notice.

Note that Fixed-Term staff completing the final Step II review successfully does not move the employee to a continuing classification. The position remains fixed-term.

CONTINUING EMPLOYMENT

In reaching a judgment regarding the Continuing Employment status application of an individual who has submitted a required Final Step II Portfolio the committee may make one of two choices: 1) grant continuing employment (only applicable to staff hired into a continuing employment position; this does not apply to fixed-term employees); or, 2) dismiss the employee.

STEP II SUCCESSFUL COMPLETION REWARD AND RECOGNITION

3 YEAR

Successful portfolio will result in remaining in present employment status.

FINAL PORTFOLIO (BY SIXTH-FISCAL YEAR) FIXED-TERM EMPLOYMENT

Successful fixed term academic staff will be recognized in good standing for re-appointment and a $2,000 base salary increase applied effective October 1 of that year.

FINAL PORTFOLIO (BY SIXTH-FISCAL YEAR) CONTINUING EMPLOYMENT

Successful continuing employment academic staff will be granted continuing employment (only applicable to staff hired into a continuing employment position; this does not apply to fixed-term employees) and a $2,000 base salary increase effective October 1 of that year.

Step III status within MSU Extension is an optional advancement opportunity for staff who consistently demonstrate scholarly work and leadership and consistently meet or exceed job performance expectations. It is a process that recognizes excellence in Extension education throughout an academic staff member's career. It is available by application to all Extension Educators, Supervising Extension Educators, Program Leaders, Extension Specialists, Associate Program Leaders and Michigan Natural Features Inventory (MNFI) Conservation Associates and Scientists who have achieved Step II status. There is no organizational expectation that staff members will apply for Step III status at any given time in their career. However, the Step III application is a recognition of high-level scholarly achievements, sustained excellence and impacts in an academic role. The process of applying for Step III promotion is voluntary and applications are self-initiated.

STEP III ELIGIBILITY

The following criteria are required of all successful Educators for Step III status:

- Must have achieved Step II Final Status and have an academic appointment of 50% or more full time equivalent (FTE).

- An Educator may submit a letter of intent to participate in Step III at any time after achieving Final Step II status.

- Evidence of good standing in the organization as reflected by performance evaluations. Consistency of good standing will be demonstrated by annual performance ratings that have consistently met or exceeded expectations since achieving Step II status.

- It is highly recommended that the portfolio be reviewed by the Institute Director and/or Associate Institute Director and, for off-campus staff, the appropriate District Director, prior to submission of the portfolio.

STEP III APPLICATION & PROCESS TIMELINE

1. **Prior to Submission of Letter of Intent**
   a. It is suggested that preparation of a Step III portfolio begin 18 to 36-months prior to anticipated submission. Preparation should include discussion with Institute Leadership and be built into the appropriate action plan(s).

b. Educator finalizes draft portfolio, with input from supervisor and peer(s), as appropriate.

2. By January 31st

a. The Peer Review Committee members for the next Step III review cycle are selected and finalized by the Extension Director's Office.

    i. For example, the Peer Review Committee to evaluate portfolio information submitted in September 2020 is selected in January 2020.

3. By August 15th

a. Seminar dates are selected in coordination with the Step III Committee and communicated from the Extension Director's Office.

b. The Educator must submit a letter of intent. Prior to submitting the letter of intent, Educators are strongly encouraged to discuss their intent and readiness with their Institute Leadership. The letter of intent must be submitted to MSU Extension Human Resources with a copy to Institute Leadership and, for off-campus staff, the District Director.

    i. The letter of intent should include the names and contact information of six potential Step III portfolio assessors from higher education institutions, at least three of which must be external to MSU and from other state(s). Assessors may not be peer-reviewers or current Step III Review Committee members.

        1. Assessors should be individuals who are of higher rank than the Educator, from an appropriate education oriented professional position, and someone who is able to make informed judgments about the Educator's work.

        2. For each assessor include name, title, telephone number, email address and mailing address.

        3. Portfolio assessments need to come from diverse sources. The final list of assessors will include three external assessors (outside of Michigan State University) and three from faculty/academic staff including but not limited to academic specialists.

        4. Assessors must be approved by the Institute Leadership, or Associate Director, depending upon the Educator's reporting line.

a. The Institute Leadership, in concert with the Associate Director, will consider the list provided by the Educator and may add additional potential assessors to develop the final list of four assessors to be contacted.

b. Assessors are only asked to review one Educator's portfolio each year, if there are duplicates the Institute Leadership will provide another option.

4. **By September 1st**

   a. Institute Leadership reviews potential assessor list and provide those selected to Extension Human Resources.

   b. Extension Human Resources will send confirmation email to applicants concerning participation.

   c. Extension Human Resources will send request to potential assessors to ascertain willingness to participate.

5. **By September 15th**

   a. A completed portfolio must be submitted as outlined in the template discussed further in this document. Seminar presentation topic must be submitted at the time of portfolio submission with a 2-3 sentence summary that describes your seminar. This summary will be used to promote your seminar with your colleagues.

   b. Charge to Peer Review Committee made by Directors' Office.

   c. The Directors' Office will contact applicants to coordinate seminar dates.

      i. Educators will be asked to choose a date and time for their seminar, based on the timeline established for the Step III process. Power Point slides will be due at least two days ahead of time. Seminars will be conducted in-person and will be available through distance technology to remote audiences. There will be an opportunity to receive instruction from the Director's office prior to the live seminar, to ensure comfort with the technology.

6. **By September 30th**

   a. Extension Human Resources will send reminder email to all assessors to complete their assessments.

   b. Directors' Office confirms final seminar dates and times to applicants and peer review committee.

7. **By October 15th**

   a. Institute Director submits Letter of Recommendation to the Step III Review Committee Chair, the Extension Associate Director, and MSU Extension Human Resources.

   b. All assessments are complete and entered into the Step III electronic system.

8. **By December 15th**

   a. The Educator will present a substantive public seminar on a topic related to one of their highlighted Educational Initiatives.

      i. The seminar should be targeted to Extension colleagues (not one of the Educator's target audiences) and should focus on one of the initiatives included in the portfolio and treated as an opportunity to highlight the chosen initiative and provide more detail. The presentation should be of a caliber like what one might present at a professional conference. The presentation is to be 20 minutes with 10 minutes for questions. Videos should not be included in seminar presentation. MSU Extension staff and faculty members shall be invited to participate in the seminar in-person and via MSU Extension distance technology. Seminars will be recorded and available for others to view for a designated amount of time following the presentation.

9. **Between December 15th and January 10th**

   a. The Peer Review Committee will meet annually to review portfolios and make recommendations for individual(s) promotion to Step III status.

10. **By January 20th**

   a. The committee's recommendations will be sent to the MSU Extension Director's office for final consideration. Successful Educators must be

approved by the Dean and Provost offices before Step III status is awarded.

11. **By April 1st**

    a. Decisions will be made regarding the outcome of portfolio submissions and seminar presentations.

12. **By June 30th**

    a. Individual Educators are notified of the outcome of the review.

13. **July 1st**

    a. Step III Senior Status title changes are effective in the year of successful review.

14. **October 1st**

    a. Any applicable Step III Senior Status raises are effective October 1st of the year of the successful review.

STEP III REVIEW COMMITTEE

The Review Committee will consist of five Senior Educator peer representatives, one from each of the four Program Institutes, and one person appointed by the MSU Extension Director. Peer representatives shall serve staggered three-year terms. Each Institute will select the peer representative to represent their Institute.

A representative from the Extension Director's office will facilitate the process as a non-voting resource person.

ROLES OF THOSE INVOLVED IN STEP III

Associate Director: Review, recommend and approve list of assessors as needed. Provide feedback on portfolio submission as an additional assessor.

Directors' Office: Coordination of Educator seminars. Provides charge to Peer Review Committee.

District Director: Receive and review the Educator's letter of intent.

Educator: Self-elect via letter of intent to participate in the Step III review. Complete and submit a Step III portfolio. Present, as outlined herein, a seminar on the identified topic.

Institute Leadership: As determined within the Institute and is either the Institute Director or the Associate Institute Director. Advise Educator regarding their intent to participate in the Step III process. Receive and review the Educator's letter of intent. Review, recommend and approve list of assessors as needed. Provide letter of recommendation.

Internal and External Assessors: Review and provide assessment of the Educator's work as demonstrated by the portfolio submission. Internal and external assessors may not act as peer reviewer(s) for a Step III applicant.

Peer Review Committee: Reviews information related to the portfolio submission and offers recommendation regarding Step III promotion to the Extension Director's Office. Step III Peer Review Committee members may not act as peer reviewer(s) for a Step III applicant.

MSU Extension Human Resources: MSU Extension Human Resources is responsible for ensuring assessments are coordinated for all Educators applying for Step III status. MSU Extension HR will email the assessors requesting the individuals' participation as an assessor and then, if they agree, to request the review and assessment of the portfolio.

STEP III SUCCESSFUL COMPLETION REWARD AND RECOGNITION

Persons attaining Step III will be titled "Senior" with the appropriate academic title, which is effective July 1 of the year Step III status is awarded.

Those attaining Step III status within the year will be recognized before their peers at MSU Extension's annual conference or an alternative major organizational event.

A base salary increase of $2,500 shall be applied on October 1, following the attainment of Step III status, in accordance with University policies and practices concerning promotional raises.

PORTFOLIO EXPECTATIONS

In the Step II and Step III portfolio(s), Educators submit up to four Extension Educational Initiatives. Initiatives typically include a collection of programs and other

scholarly activities. Up to three items of support materials for each educational initiative can be included with up to five pages per support item. The committee will pay special attention to the distinction between educational programs and activities, the needs analyses on which the programs are built, the evaluative techniques used to demonstrate results, the explanation of how these programs' results impact people and multicultural and diversity efforts associated with the initiatives. Writing about your Extension Educational Initiatives can be guided by understanding the definitions of MSU Extension's core competencies and Extension scholarship.

Core competencies are basic sets of knowledge, skills, attitudes, and behaviors required to be an exemplary Extension professional. MSU Extension has core competencies that highlight the attributes needed by all MSU Extension employees, which, when combined with technical knowledge and skills, allow staff to be effective in addressing educational issues. The portfolio review committee will be looking for evidence of your proficiency or mastery of these core competencies.

Scholarship is a cornerstone of MSU Extension. Within the university community, scholarship is a set of processes through which knowledge is discovered, integrated, applied, and taught. Scholarship, particularly in the College of Agriculture and Natural Resources (CANR) of which MSU Extension is affiliated, involves research scholarship, extension scholarship, and teaching scholarship.

Extension scholarship can be accomplished in many ways. One of the important strengths of MSU Extension is its flexibility in the use of multiple approaches that are best adapted for developing, integrating, applying, and teaching knowledge in a variety of ways to help the people whom MSU Extension serves.

DEFINING EXTENSION SCHOLARSHIP

Extension scholarship is engaged scholarship. It is not just about publishing or presenting. It is about engagement and sharing with colleagues. It is about raising the bar and going beyond simply delivering a good program to local clientele (Smith, 2004).

The following information on scholarship should help guide the Educator's portfolio focus. Criteria used for evaluating portfolios on excellence in Extension education are built upon principles of scholarship. Portfolio expectations shift over the course of an Educator's career and it is expected that evidence of scholarship will build over time.

"Extension scholarship is the systematic generation, integration and application of knowledge based on both concepts and practice with the intent of improving people's lives. Scholarship of Extension takes place through an interactive, dynamic and

expanding process in which both concepts and practice are advanced through a continuing process for improving knowledge that is validated by peers."

- *Scholarship of discovery*
  - *Advancement of knowledge (i.e., conducting program evaluations using validated and reliable instruments; utilizing existing databases to guide programming decisions; locally designing assessments or surveys).*
- *Scholarship of integration*
  - *Working across disciplinary boundaries, synthesizing, looking for new meaning (i.e., involved interpreting others' work in new or novel ways that make complex ideas understandable to a larger audience; cross-programming efforts).*
- *Scholarship of application*
  - *Applying knowledge to problems in society. This form of scholarship is what makes the "scholarship of discovery" and the "scholarship of integration" practical and useful (i.e., results suggest the need for additional scholarly inquiry; development of programs to address identified problems; serving as an expert consultant or committee appointee).*
- *Scholarship of teaching*
  - *Practice and inquiry. Teaching is the blending of the scholarship of integration and application. For Extension professionals, teaching is the primary basis for productivity (i.e., invited or peer-selected presentations; peer-review publications; creation or dissemination of a training program for use by other professionals).*

Boyer, E.L. (1990). Scholarship reconsidered: Priorities of the professoriate. Princeton, New Jersey: Princeton University Press, The Carnegie Foundation for the Advancement of Teaching.

The elusive scholarship of teaching. To separate the scholarship of teaching from scholarly teaching, the work must meet these criteria:

- The work must be made public.
- The work must be available for peer review and critique according to accepted standards.
- The work must be able to be reproduced and built on by other scholars.

Glassick, C. E. (2000). Boyer's expanded definitions of scholarship, the standards of assessing scholarship, and the elusiveness of the scholarship of teaching. *Academic Medicine, 75(9)*, 877-880.

Six standards or criteria to assess the quality of scholarship can be applied to all four forms of scholarship proposed by Boyer (discovery, integration, application, and

teaching). The standards were derived from information collected by Carnegie scholars and the standard remains supported by the Joint Council of Extension Professionals (JCEP).

STANDARDS OF SCHOLARSHIP

1. *Define measurable objectives, goals, and questions*
2. *Review of literature, theory, and best practices*
3. *Choose appropriate methods and analyses*
4. *Communicate results effectively*
5. *Challenge assumptions (were the goals achieved? How results add to the field?)*
6. *Reflect critically on work and future implications*

Glassick, C. E., Huber, M. T., & Maeroff, G. I. (1997). Scholarship assessed: Evaluation of the professoriate. Princeton, NJ: The Carnegie Foundation for the Advancement of Teaching.

PORTFOLIO TEMPLATE

GENERAL SUBMISSION INFORMATION

- Quality of the portfolio in both content and format should be excellent.

- Your portfolio should emphasize your best work.

- Grammar, concision, and clarity are important elements to ensure a successful portfolio.

- Font no smaller than 12 point.

- Single-spaced.

- Appropriate citation is required throughout the portfolio.

- Instances of plagiarism lead to discussion of termination. You are encouraged to proactively evaluate your portfolio against other documents, including any Step example documents you may have referenced, via a plagiarism checker prior to submission.

- All sections and supporting documentation must be combined and submitted as one pdf document.

- The support materials should be scanned and included immediately following the initiative they support. Including a title for each support document can be helpful to communicate the purpose of inclusion in the portfolio.

- Number all pages consecutively including support materials.

- Portfolio should be written in first-person.

- When preparing your portfolio, it is important that Educators allow ample time for a serious, in-depth review process prior to submission, especially when

determining the number of educational initiatives to emphasize and deciding what support items to include for each highlighted Educational Initiative.

- The portfolio template should be followed in terms of layout, order of material being presented and categories. A cover page to the portfolio including name, title, Institute and County is acceptable but not required.

- The portfolio template below is periodically updated and modified by the MSU Extension Administrative Team. Using a colleague's previously successful Step portfolio as a template is not recommended.

- Each successive portfolio submission should demonstrate additional achievement and growth since successful completion of the previous Step level.
  - o Six-year/final portfolio submissions should demonstrate continued growth and progression since the initial three-year review. A six-year/final portfolio submission should demonstrate greater sustained impacts and scholarship outcomes than would typically be presented in the three-year application.

- Examples of successful Step II and Step III Portfolios are available on SharePoint (https://sp.anr.msu.edu/sites/MSUEAllStaff/step2information/SitePages/Home.aspx).

NOTE: Incomplete portfolios that are submitted will not be reviewed by the Review/Peer Review Committee or sent to assessors, if applicable, for review. Incomplete Step II portfolios may result in unsuccessful completion of the portfolio and lead to termination of employment. Incomplete Step III portfolios will be returned to the Educator for possible submission in a future year.

SECTION ONE – EDUCATOR INFORMATION, REFLECTIVE ESSAY & POSITION INFORMATION

Maximum 3 pages

EDUCATOR INFORMATION

- Name

- Current Title

- Date of hire with MSU Extension

- Date of receipt of Step II, if applicable

- Education (degree(s), major and educational institution)

- Continuing employment OR fixed term appointment

- Institute(s)/Department(s) and work team affiliation(s)

REFLECTIVE ESSAY

The reflective essay should include the following:

- Describe your understanding of your role as an Extension Educator

- Describe any changes or progression in your position or responsibilities.

- Describe division of current position responsibilities, using percentages including a breakdown of education vs. administrative role(s), if any

- List your major educational initiatives

- Describe why you do the programming that you do and the reasons behind why you deliver programming in the manner you do so

- Describe demographics of the population served

- Additional resources/reference materials about writing Reflective Essays are available with the Step II materials online.

- Professional Development – Summarize professional development opportunities in support of your initiative or administrative responsibilities since the date of hire

or the achievement since successful completion of the previous Step level, as applicable.

- Advanced degrees attained or credit course work completed.

- Non-degree/credit professional development (extension in-service, non-extension trainings, leadership/management training, technical competency, etc.) and the year(s) that each occurred.

- Honors and Awards – Briefly summarize organization and peer recognition.

Submit up to 4 initiatives. Maximum 4-page narrative/outline per initiative. Maximum 3 items of support materials for each educational initiative, with a 5-page limit per support item. Support materials should best represent your significant work.

Organize materials in this section by educational initiative to show a collection of well-documented and significant efforts, events, and activities all leading to a particular outcome or set of outcomes. Major initiatives should correspond with Educators' responsibilities since successfully completing the prior Step level and/or if the initiative has continued and been significantly expanded upon in subsequent years. Supervising educators may feature staff training initiatives in this section. The role(s) an Educator has performed related to the initiative should be highlighted throughout this section. If an Educator did not perform a role as listed, to the role may be removed from the portfolio.

- **Title** –Title should be a short paragraph or description of the initiative. (e.g., direct education to target audience(s), train-the-trainer, staff training, etc.).

- **Initiative Objectives** – Stated in terms of expected participant or client outcomes. Use of Institute or work team logic models and indicators for outcomes is highly encouraged.

- **Needs Assessment** – Process for identifying need and acquiring stakeholder input relative to need for this Educational Initiative. Needs assessment is a process not just a compilation of statistics about audience. Include method and results from surveys, focus groups, or other means of collecting needs assessment information.

- **Educator Role(s) in this educational initiative** – Include all applicable information about the following roles you performed. Do not repeat information about roles performed. Organize information in way that highlights your personal contribution to team or statewide efforts.

  - **Teaching**– Method(s) of Initiative Delivery (Outputs) - Include all applicable information about the following roles you performed, including but not limited to number of participants reached.

  - **Teaching Media, Format, or delivery method** – Educator's role in developing or teaching in formats (workshop, self-study, demonstration, field trial, distance education, online courses, face-to-face, etc.)

  - **Trainer of program staff or volunteers**

- **Team Member** – Educator's role within work team or with partners

- **Supervisor** – supervising role of educational initiative staff or program volunteers

- **Research Collaborator** – Educator's role in research project or faculty/departmental connections in conducting, translating, or disseminating research

- **Applied Research**– brief synopsis of any applied research project(s) associated with the educational initiative and a description of the Educator's significant role on applied research projects (this does not mean the use of evidence-based curricula in the design and delivery of the educational initiative)

- **Facilitator** – Educator's role in obtaining financial support, team development, community collaboration

- **Leadership within Team** – Educator's significant role on the educational initiative development, delivery, and evaluation

- **Facilitator** – classic definition of facilitator (i.e. facilitation of community members/leaders as related to programming effort)

- **Marketing strategy** – How Educator incorporated outreach to targeted, underserved, and diverse audiences.

- **Adaptation implemented to accommodate diverse audiences** – Translation, sign language, special materials, etc.

- **Collaborations/Partnerships** – include scope of work and individual contribution to teams in these local, regional, multi-state, national, and international partnerships. Specify applicable information about the roles you performed.

- **Secured Resources** – specify amount and funder of grants, contracts, in-kind contributions from organizations, cost recovery, endowments, service agreements, gifts, other. Specify applicable information about the roles you performed.

- **Extension Scholarship Products** – title, indicate whether work was individual or team, and highlight contribution of Educator. Examples may include:

  - Created presentations (e.g., teaching materials, curriculum, invited speeches, workshops, radio and TV programs, public exhibits, demonstrations)

- Sharing of initiative outcomes and/or research findings with peers on a regional, state, multi-state, and/or national level

- Visual materials (e.g., slide sets, videos, computer-based audio-visual presentations, online course development, recorded webinar)

- Written materials & Publication(s) (e.g., journal articles, research brief or policy papers, reports, bulletins, handbooks, manuals, fact sheets, newsletters, trade or industry magazine articles, and other publications with readership. Publications should include citation, title, date, authors, etc. Describe Educator's contribution

- **Program Outcomes and Impacts of this Educational Initiative**

  - Methods of Evaluation for Initiative Outcomes

    - There may be multiple programs and methodologies within a robust educational initiative. Describe evaluation design, how the evaluation instrument was administered, and Educator's role in initiative evaluation processes and collection of statewide data, if applicable.

    - Describe initiative evaluation method(s) (pre/posttest, exit survey, post-reflective survey, longitudinal follow-up survey, etc.). Educators to show mastery of the concepts and how results inform educational initiatives.

    - Describe how the evaluation instrument was administered, i.e. written, verbal, online, etc.

    - Describe any efforts to make the evaluation process accessible to diverse audiences.

  - Include summarized results of program evaluation efforts over time showing alignment with educational initiative objectives and/or evaluations (e.g., same program over years or short-term and follow-up data combined). Aggregate findings/results from multiple events and activities. Organize findings into clear and concise bullets for the narrative and use support materials to display additional findings. When an Educator uses statewide evaluation results to report outcome data, it is recommended that they display their contribution to those results. When an Educator delivers a program that has a standardized program evaluation used by a work team, those outcomes can be included, but the Educator will need to

show how their programs compare and/or have contributed to the statewide annual reports and use of that information.

- o Include program descriptions, audiences reached, evaluation methodology, total number of attendees/possible responses (population) compared to total number of responses (sample size), the findings and the implications.

- o Do not copy and paste from MiPRS or other reporting systems.

  - Organize findings into clear and concise narrative supported by summarized data. Narrative should include:

    - Event/activity description

    - Audience description

    - Evaluation methodology

    - Total number of attendees/possible responses (N = population)

    - Total number of responses (n = sample size)

    - Impact (finding). Report aggregated and/or longitudinal data on key objectives, if available

    - Compare participant outcome with control group outcome, if available

- **Volunteer/Stakeholder Role and Responsibility**. (A volunteer is anyone who is not paid by MSU Extension and assists in helping to design, deliver and/or evaluate our educational efforts.)

  - o Describe volunteer role in program planning, implementation, and evaluation

- **Support Materials** (maximum of three items, 5 pages max for each support item)

  - o Support materials for each initiative must be exhibited immediately following the narrative. They should be referenced in the narrative to illustrate the relationship to the initiative. At the end of the narrative and prior to the support pieces for each initiative, provide an exhibit list of associated support pieces that includes the following:

- Name of support piece

- Brief description of the relationship of the piece to the initiative

- Role of the Educator in the development of that piece. For example: "Co-authored by Smith and Jones" or "Developed by Smith"

- NOTE: The purpose of the support materials is to help illustrate the work described in the corresponding Educational Initiative. Support materials are not about quantity but rather a selected variety of items that demonstrate your skills in program planning, implementation, evaluation, publication, etc. Do not include entire publications – only a scan of the cover, acknowledgments, and table of contents. Please highlight segments of support materials that are particularly relevant to your role or impact.

o Types of support materials to consider include:

- Summarized program evaluation outcomes from statewide, aggregated reports, highlighting personal contribution to data collection and use.

- Evaluation data summaries demonstrating your skills in data handling and reporting of key evaluation findings as related to stated educational initiative objectives.

- Evaluation instrumentation used to collect the data used in your summaries. Highlight your contribution to a project or team.

- Categorized participant comments regarding the programming effort. (Be concise)

- Educator-developed educational materials - may include outline of educational presentation, fact sheets, selected portions of publications, educational handouts, PowerPoint handout (6 slides/page), or a listing of these with active links.

- Pertinent information on the program (may include marketing brochures, news releases, website links, etc.)

- Publications (scan of cover/title page, acknowledgements, and table of contents only)

- Other significant items developed by the Educator that relate directly to the programming effort.

- o Do NOT include:

    - Personal letters from clientele thanking you for the program or recommending you for promotion

    - Master's or doctoral thesis (Executive Summary acceptable)

    - News releases or MSU Extension news articles

- **STEP III ONLY – Seminar Presentation Topic**

    - o The Educator will present a substantive public seminar on a topic related to one of their highlighted Educational Initiatives. Submit a 2-3 sentence summary that describes your seminar. This summary will be used to promote your seminar with your colleagues.

Extension Educators who have held an Administrative Assignment (Supervising Educators, or other academic administrative positions) during the period being presented for review should complete this section. Focus on administrative/supervisory responsibilities (not staff training) in this section.

- Describe your supervisory/administrative assignment (percentage, number of staff, geographic region, etc.)

- Describe major supervisory/administrative goals of the Educator. Each goal should coincide with the Educator's administrative responsibilities in the following areas which reflect the Administrative Competencies available here: http://od.msue.msu.edu/professional_development/core_competencies:

  - Physical & Fiscal Resources

  - Teamwork & Leadership

  - Partnerships & Collaboration

  - Program Development, Evaluation, and Reporting

  - Educational Delivery & Technology Adoption

  - Diversity, Equity, and Inclusion

  - Interpersonal & Organizational Professionalism

For information on how these competencies implemented in 2018 tie to previous competencies for MSU Extension review the information in the comparison found here: https://www.canr.msu.edu/od/professional_development/revisedcompetencies2019.pdf.

- For each major supervisory/administrative goal, provide a 1 to 2 page narrative/outline that presents the following:

  - Title

  - Objectives

  - Target audience

  - Impact/Outcomes achieved

  - Role

- Creative Accomplishments

- Collaborations and partnerships developed-include scope (local, regional, multi-state, national, international)

- Secured Resources (in kind contributions, cost recover, enhanced initiative sustainability, grants and contracts, endowment, gifts, other)

- Peer Presentations-sharing of initiative or research findings with peers

- Support Materials (same guidelines as previous)

Maximum of 2 pages

- Service to the Organization – To be organized by county, district, state, interstate, national service, include year(s) that each occurred.

  Examples:

  - service on educational initiative planning committees (curriculum committees, Institute work teams and/or work groups)

  - service in support of the University, College and/or Extension organization. (Advisory Committee, working with District Extension Council, search committees, review committees, Taskforce membership)

- You may also include service to MSU Colleagues, and others, as a peer reviewer of materials, curriculum, publications, etc. (Do not include peer review of monthly MSU Extension articles.)

- Service to the Local Community as a representative of the University, include year(s) that each occurred (not to be confused with other community volunteer roles you might take on such as church or local civic organizations)

  Examples:

  - services on local advisory committees, business and industry groups, government agencies and task forces (not led by the local extension program) which benefit from the educator's expertise (in both subject matter and organizational leadership abilities)

- Service to the Profession, include year(s) that each occurred

  Examples:

  - involvement with professional associations

  - involvement in planning professional development opportunities (association conferences, in–service opportunities, etc.)

  - mentoring of new staff (helping to establish sound working practices for effective extension educators)

  - supervising of program interns

Maximum of 2 pages

- Team Participation – Describe what your role has been as a team member: How have you contributed to the work of a local, national, multistate, or regional team and what leadership role(s) have you played as part of the team? This may also include your leadership role in collaborations between work teams or institutes.

  Examples:

  - Establishing and supporting a local community advisory board.

  - Work team collaborative programming within and across institutes.

  - Program collaborations with local and national organizations.

- External Partnerships – Describe examples of programming partnerships that you have established with groups external to MSU Extension. Describe the community impact of one of these examples.

  Examples:

  - Working collaboratively with a community partner to develop a needs assessment and focus group(s) to inform program development and delivery.

  - Partnering with a faith-based organization to ensure access by youth and adults underrepresented in your current programming efforts.

  - Collaborating with a community organization to leverage resources (financial, human, etc.) to support initiative success and sustainability.

- Civil Rights & Diversity – Describe several examples of your efforts toward achieving civil rights and diversity and accessibility objectives within your programming responsibility. Discuss how these efforts have enhanced your initiatives.

  Examples:

  - Curriculum adaptations and other accessibility efforts to support the inclusion of persons with disabilities.

  - Multicultural Mini Grant programs/initiatives.

- Establishing and nurturing diverse networks to assist with program marketing and participation.

- Curriculum adaptations to ensure culturally relevant content for multicultural, multilingual program participant.

Maximum of 3 pages

A personal reflection written in essay format, about the Educator's accomplishments and philosophy as relates to their Extension efforts and plans for continued achievement.

The Critical Reflection Essay holds a unique position in the Educator's Step III portfolio. Consequently, the Essay should not be a summary of evidence presented in the portfolio or a historical account of the Educator's Extension career. Instead, the Essay should provide significant insight into the Educator's understanding of their professional pursuits as related to their vision of future Extension professional goals and objectives.

The Essay should:

- Convey the Educator's vision of herself/himself as a maturing professional in Extension including scholarly niche;

- Communicate the contributions made in advancing toward that future vision; and

- Show how the Educator's work and scholarship have prepared them for that future.

- Describe their future Extension career goals and indicate plans for reaching those goals.