

STEP PROCESS REVIEWS IN MSU EXTENSION

APPLICATION GUIDELINES, REVIEW PROCEDURES, AND PORTFOLIO
EXPECTATIONS

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INTRODUCTION

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, with the exception of administrators aligned to the Extension 5-Year Administrator Review process¹. Step I status is granted upon employment of an eligible academic employee. Step II status is required and granted upon successful completion of both the First² and Final³ portfolio reviews. Application for Step III status is optional and may occur following attainment of Step II status.

The portfolio review is an opportunity to demonstrate the progress a MSU Extension academic staff member has made in understanding their role, 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.

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

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

STEP II & STEP III PORTFOLIO SUBMISSION

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.

¹ Administrative staff aligned to the Extension 5-Year Administrator Review include: Extension Associate Director, Extension Institute Directors, Extension Associate Institute Directors, Extension District Directors.

² Submission follows completion of three full fiscal years of employment, essentially making the First Step II portfolio due in employment year 4 or 5.

³ Submission required three-years after completion of First Step II portfolio.

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 two Step II Portfolios that demonstrate long term performance, professional development, and other achievements. If the review committee determines an Applicant's First Step II portfolio submission is exceptionally done, it may be suggested to the Applicant that the Final portfolio can be submitted prior to the year it is required. Any eligible employee may submit the Final Step II Portfolio early but must submit the Final Step II Portfolio by three-years after successful completion of the First Step II portfolio review, for instance an individual who has successfully completed their First Step II portfolio in 2024 must submit their Final Step II in 2027.

An employee electing to submit a Final Step II portfolio prior to the year it is required 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 applicant'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 First and/or Final Portfolio review prior to hiring or rehiring into Extension. Additional details on the wavier process can be obtained by Extension Leadership from MSU Extension Human Resources.

STEP II APPLICATION & PROCESS TIMELINE

- 1. By August 1st**
 - a. Employees electing to submit a Final Step II portfolio prior to it being required 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 Applicant will seek an initial review of the portfolio from the Applicant'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 Applicant submits the portfolio application through established processes.
- 5. By April 30th**

- a. The Associate Extension Director(s), Institute leadership, and District Director, provide their feedback through established processes.

6. May through June 15th

- a. The review committee will meet 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.

7. By July 1st

- a. The individual Applicant is notified of the outcome of the review.

8. October 1st

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

STEP II REVIEW COMMITTEE

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 member of the Institute Leadership, the District Director assigned to the Organizational Development team and Associate Director.

ROLES OF THOSE INVOLVED IN STEP II

- **Applicant:** Complete and submit a Step II Portfolio.
- **District Director:** Provide guidance around completion of Portfolio, review final portfolio, and submit feedback, as part of the Committee, will vote on the outcome of the review process for assigned Applicant(s).
- **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 Applicant(s) in their Institute.
- **Extension Associate Director:** Review portfolios, provide feedback electronically and, as part of the Committee, vote on the outcome of the review process for all Applicants.
- **MSU Extension HR Manager or an appointed designee:** Facilitate the process as a non-voting resource.

STEP II PROCESS & POSSIBLE OUTCOMES

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

Unsuccessful Final portfolio submissions completed early - at year one or two after a First portfolio review - will result in no change to employment status and the employee will need to resubmit a portfolio for review the third year after the First portfolio review was complete.

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

Unsuccessful Final year portfolio submissions completed in year three after the First portfolio review will result in termination. Fixed-term employees will be given 60 days' 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.

STEP II SUCCESSFUL COMPLETION REWARD AND RECOGNITION

FIRST STEP II PORTFOLIO

A successful portfolio will result in the employee remaining in present employment status.

FINAL STEP II PORTFOLIO

Successful academic staff will be recognized in good standing for reappointment and a \$2,000 base salary increase applied effective October 1 of that year.

STEP III - OPTIONAL

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 their work 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, Conservation Associates and Conservation 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, a successful Step III application is recognition of high-level scholarly achievements and 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 Applicants 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 Applicant may submit a Step III portfolio 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.
- The portfolio is reviewed by Institute Leadership prior to submission of the portfolio.

STEP III APPLICATION & PROCESS TIMELINE

1. Prior to Submission of Step III Portfolio (due December 1st)
 - a. Preparation of a Step III portfolio should begin at least 18-months prior to anticipated submission, 36-months is better. This includes discussions with Institute Leadership about desired submission timeline and should be incorporated into the annual action plan(s).
 - b. Applicant will draft and finalize the Step III portfolio. Review by Institute Leadership or Associate Director, depending on the Applicant's reporting line; District Director, if applicable; and peer(s), as appropriate; prior to submitting the final portfolio with potential assessors and presentation topic.
 - c. Applicant selects six potential Step III portfolio assessors from higher education institutions, ensuring they are from a variety of sources.
 1. At least three assessors must be external to Michigan State University, and three from internal faculty/academic staff, including but not limited to academic specialists. Assessors may not be peer-reviewers or current Step III Review Committee members.
 2. Assessors should be individuals of higher rank than the Applicant, from an appropriate education-oriented professional position, and someone capable of making informed judgments about the Applicant's work.
 - d. For consideration when suggesting and choosing assessors:
 1. Aim for a group of varied perspectives from different organizations, regions, and backgrounds.
 2. Consider assessors' years of experience, education level, and role in their organization.
 3. Ability of assessor to maintain objectivity and an understanding of the Extension and/or programming environment.

4. Possess relevant knowledge and expertise in specific program areas; consider understanding of Extension objectives.
 5. Assessor is equipped to evaluate key applicant qualities, such as leadership, creativity, community engagement, and expertise in underserved populations.
 6. Assessors should be willing to serve, available for the required time, and capable of providing substantial feedback.
- e. Applicant will provide the name, title, institute association, telephone number, email, and mailing address of six potential Step III portfolio assessors to Institute Leadership or Associate Director, depending on the Applicant's reporting line for review, and discussion.
1. Institute Leadership or Associate Director, depending on the Applicant's reporting line, will review and discuss assessors with the Applicant, may add additional potential assessors to develop the final list of four assessors, and will include the approved list of assessors in the Letter of Recommendation.
 2. Assessors are only asked to review one Applicant's portfolio each year, if there are duplicates across portfolios, the Institute Leadership will provide another option.
2. By September 1st
- a. The Review Committee members for the next Step III review cycle are selected and finalized by the Extension Director's Office.
 1. For example, the Review Committee to evaluate portfolio information submitted in December 2024 is selected before or in August 2024.
 - b. Seminar dates are selected in coordination with the Step III Committee and communicated from the Extension Director's Office.
 - c. Charge to Review Committee made by Directors' Office.
3. By December 1st
- a. The Applicant must provide submission information and the completed Step III portfolio to the Institute Leadership or Associate Director, depending on the Applicant's reporting line, with a copy to applicable District Director, and MSU Extension Human Resources through the submission process.
 - i. The completed portfolio must be submitted as outlined in the template discussed further in this document.
 - ii. Submission information must include:
 1. The name, title, institute association, telephone number, email, and mailing address of six potential Step III portfolio assessors.
 2. Seminar presentation topic must be included as a 2-3 sentence summary that describes the seminar. This summary will be used to promote the seminar in internal communications.
 3. The seminar should be targeted to Extension colleagues (not one of the Applicant'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.

4. By December 8th
 - a. Institute Leadership reviews Applicant's submission information and completed Step III portfolio. This should be a final review after discussions regarding the draft leading up to the Applicant's submission.
 - b. Upon approval, a Letter of Recommendation is submitted by the Institute Leader to the Extension Director's Office, the Applicant, the District Director, and MSU Extension Human Resources.
 1. The letter of recommendation includes the final list of the four approved assessors including all contact information.
 2. If Institute Leadership determines the portfolio is not ready to move forward for committee review, they will notify the Applicant and discuss next steps to further prepare/revise the Step III portfolio.
 3. Institute Leader will notify MSU Extension HR regarding status of the Step III submission.
5. By January 15th
 - a. Extension Human Resources will send confirmation email to applicants concerning participation.
 - b. Extension Human Resources will send requests to potential assessors to confirm participation.
6. By February 15th
 - a. Extension HR will confirm assessors who have agreed to participate and/or work with Institute Leadership to identify additional assessor(s), as needed.
 - b. The Directors' Office will contact applicants to coordinate seminar dates.
 - i. Applicants 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 schedule presentation. Seminars will be conducted in-person and will be available live 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.
7. By March 1st
 - a. Extension Human Resources will send a reminder email to all assessors to complete their assessments.
 - b. Directors' Office confirms final seminar dates and times to applicants and review committee.
8. By March 15th
 - a. All assessments are complete and entered into the Step III electronic system.
9. By May 15th
 - a. The Applicant presents their public seminar.
10. By May 20th

- a. The Review Committee will meet to review portfolios and make recommendations for individual(s) promotion to Step III status.
 - b. The committee's recommendations will be sent to the MSU Extension Director's office for final consideration.
11. By June 1st
- a. Decisions will be made regarding the outcome of portfolio submissions and seminar presentations.
 - b. Successful Applicants must be approved by the Dean and Provost offices before Step III status is awarded.
12. By July 1st
- a. Individual Applicants are notified of the outcome of the review.
13. July 1st
- a. Step III Senior Status title changes are effective July 1st in the year of successful review.
14. October 1st
- a. Any applicable Step III Senior Status raises are effective October 1st following the successful review

STEP III REVIEW COMMITTEE

The Review Committee will consist of five Senior Academic representatives, one from each of the four Program Institutes, and one person appointed by the MSU Extension Director. Representatives shall serve staggered three-year terms. Each Institute will select the representative for 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, depending on reporting line. Provide feedback on portfolio submission as an additional assessor.

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

District Director: Review the Applicant's draft portfolio submission as requested. Provide feedback to support success in the Step III process.

Applicant: Self-elect to participate in the Step III review. Complete and submit a Step III portfolio, potential assessors, and seminar topic. 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 Applicant regarding their intent to participate in the Step III process. Receive and review the Applicant's draft Step III portfolio and provide substantive feedback to support success in the Step III process. Review, recommend and approve list of assessors as needed. Provide a letter of recommendation.

Internal and External Assessors: Review and provide assessment of the Applicant's work as demonstrated by the portfolio submission. Members of the Review Committee may not act as assessors for a Step III applicant.

Review Committee: Reviews information related to the portfolio submission and presentation. Offers recommendation regarding Step III promotion to the Extension Director's Office. Step III Review Committee members may not act as assessors for a Step III applicant.

MSU Extension Human Resources: MSU Extension Human Resources is responsible for ensuring assessments are coordinated for all Applicants applying for Step III status. MSU Extension HR will email the assessors requesting the individual's 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 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), Applicants submit up to four Initiatives. Initiatives typically include a collection of programs and other scholarly activities and/or supervisory/ administrative 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 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 culture, access and belonging efforts associated with the initiatives. Writing about your 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 their role. 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 Applicant'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 Applicant'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."

TYPES OF SCHOLARSHIP

- *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.](#)

DOCUMENTING AND ASSESSING SCHOLARSHIP

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

- The 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 strongly 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 integration 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 Applicants 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 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 is periodically updated and modified. 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.
 - Final Step II portfolio submissions should demonstrate continued growth and progression since the First Step II review. A Final Step II portfolio submission should demonstrate greater sustained impacts and scholarship outcomes than would typically be presented in the First Step II application.
 - Step III portfolio submissions should demonstrate continued growth and progression since the Final Step II review. A Step III portfolio submission should demonstrate greater sustained impacts and scholarship outcomes than would typically be presented in the Step II process. Additionally a Step III portfolio demonstrates significant plans for furthering their work based on historic data and outcomes, and a plan for continued development of programming.
- 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 submitted will not be reviewed by the Review Committees or sent to assessors, if applicable. 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 Applicant for possible submission in a future year.

TEMPLATE

SECTION ONE – APPLICANT INFORMATION, REFLECTIVE ESSAY & POSITION INFORMATION

Step II Applicant information and Reflective Essay Maximum of 3 pages, with Step III Critical Reflection maximum of 6 pages

APPLICANT 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 Academic employee.
- 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.

Step III Portfolio additional guidance:

Critical Reflection - Maximum of 3 pages

An extension of the reflective essay the critical reflection is an essay about the Applicant'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 Applicant's Step III portfolio. Consequently, the Essay should not be a summary of evidence presented in the portfolio or a historical account of the Applicant's Extension career. Instead, the Essay should provide significant insight into the Applicant's understanding of their professional pursuits as related to their vision of future Extension professional goals and objectives.

The Critical Reflection should:

- Convey the Applicant's vision of themselves as a maturing professional in Extension including scholarly niche and how their career to date has prepared them to reach future goals programmatically and professionally;
- Philosophy of and/or high-level summary of data behind the development of the work which could include but might not be limited to emerging issues, shifts, etc.
- Describe their future Extension career goals and aspirations and indicate plans for reaching those goals including but not limited to research, data, emerging issues, funding, etc., that influence these plans.
- Communicate the contributions made in advancing toward that future vision; and
- Show how the Applicant's work and scholarship have prepared them for that future.

SECTION TWO – CULTURE, ACCESS AND BELONGING, CIVIL RIGHTS AND ACCESSIBILITY EFFORTS

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 & Culture, Access and Belonging** – Describe several examples of your efforts toward achieving civil rights and accessibility objectives within your programming responsibility. Discuss how these efforts have enhanced your initiatives.

Examples:

- Curriculum and teaching method adaptations and other accessibility efforts to support the needs of participants and partners.
- Multicultural Mini Grant programs/initiatives.
- Establishing and nurturing a wide range of networks to assist with program marketing and participation.

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

Step III Additional Guidance:

- Evidence of progression through multiple functions of the work including but not limited to:
 - Partner development to partner engagement to partner responsiveness based on needs of the group as supported by data and potential by funding;
 - Funding to ensure stability of successful programs/efforts from sourcing, to pursuing, to management of funds in support of sustained programming for continued long-term impacts
 - Development and implementation of change in programming based on supported data
 - Development, implementation and evidence of sustained change as supported by evaluation data
- Development of and sustained engagement with Advisory Councils and/ or coalitions based on needs assessment.
- Long-term engagement with non-traditional and/or historically excluded groups specifically demonstrated through impactful programming as supported by evaluation data.

SECTION THREE – EXTENSION EDUCATIONAL INITIATIVES

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 Applicants' responsibilities since successfully completing the prior Step level and/or if the initiative has continued and been significantly expanded upon in subsequent years. Supervising Applicants may feature staff training initiatives in this section. The role(s) an Applicant has performed related to the initiative should be highlighted throughout this section. If an Applicant did not perform a role as listed, 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.
- **Applicant 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 a 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** – Applicant'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** – Applicant's role within work team or with partners
 - **Supervisor** – supervising role of educational initiative staff or program volunteers

- **Research Collaborator** – Applicant’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 Applicant’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** – Applicant’s role in obtaining financial support, team development, community collaboration
- **Leadership within Team** – Applicant’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 Applicant incorporated outreach to individuals and groups who are underserved and/or from various backgrounds.
- **Adaptation implemented to accommodate varied audience needs** – 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 Applicant. 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 Applicant’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 Applicant'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.). Applicants 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 all 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 Applicant uses statewide evaluation results to report outcome data, it is recommended that they display their contribution to those results. When an Applicant delivers a program that has a standardized program evaluation used by a work team, those outcomes can be included, but the Applicant will need to show how their programs compare and/or have contributed to the statewide annual reports and use of that information.
 - 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.
 - Do not copy and paste from 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.)
 - Describe volunteer role in program planning, implementation, and evaluation.
- **Support Materials** (maximum of three items, 5 pages max for each support item)
 - 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 Applicant 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.
 - 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)
 - Applicant-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 Applicant that relate directly to the programming effort.
- 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 Additional Guidance:

- Reflection on educational initiatives to assess their effectiveness and identify areas for improvement.
- Discussion of long-term evaluation data used to make necessary adjustments to programs.
- Discuss how changes in initiatives may influence additional long-term outcomes.
- Demonstrate and share your expertise with peers at local, state, national, and international levels.
- Participate in various capacities within educational initiatives, enhancing collaboration and impact.
- Securing grants and/or other funding supports, specifically resulting in progression with deliverables

- Continuously advancing the field through high-level scholarship, impactful programming, outreach and research
 - Examples include but are not limited to:
 - Publishing peer-reviewed journal articles
 - Developing and sharing curricula through professional channels
 - Presenting at regional and national conferences/ events

STEP III ONLY – Seminar Presentation Topic

- The Applicant 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 with your complete Step III portfolio. This summary will be used to promote your seminar with your colleagues.

SECTION FOUR - EXTENSION SUPERVISION/ ADMINISTRATIVE INITIATIVES

Step Applicants whose position is comprised mainly of supervisory/ administrative responsibilities (not training for staff as part of a programming areas) during the period being presented for review should complete this section. Supervision/ administration reflected as directly and only related to a specific educational initiative previously demonstrated in this portfolio should not be repeated here.

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

- Describe your supervisory/ administrative assignment (percentage, number of staff, geographic region, etc.)
- For each major supervisory/administrative initiative narrative/outline that presents the following:
 - Title
 - Initiative/ Objectives
 - Primary Core Competencies addressed in this goal
 - Each initiative should coincide with the Applicant's supervision and staff development responsibilities in the following areas which reflect the [Administrative Competencies available here:](http://od.msue.msu.edu/professional_development/core_competencies)
[http://od.msue.msu.edu/professional_development/core_competencies:](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
 - Culture, Access, and Belonging
 - Interpersonal & Organizational Professionalism
 - Target audience
 - Impact/Outcomes achieved
 - Role

- **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** – Applicant’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** – Applicant’s role within work team or with partners
 - **Collaborator** – Applicant’s role in project or faculty/departmental connections in conducting, translating, or disseminating research
 - **Leadership within Team** – Applicant’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)
- 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** (maximum of three items, 5 pages max for each support item)
 - 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 Applicant 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.

- 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)
 - Applicant-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 Applicant that relate directly to the programming effort.
- 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 Additional Guidance:

- Evidence of initiatives supporting direct report success, accountability, and development, and positive team culture as demonstrated by data.

- Reflection on supervisor/ administrative initiatives to assess their effectiveness and identify areas for improvement.
- Discussion of long-term evaluation data used to make necessary adjustments to supervisory/ administrative initiatives/ strategies.
- Discuss how changes in initiatives may influence additional long-term outcomes.
- Demonstrate and share your expertise with peers at local, state, national, and international levels.
- Participate in various capacities within supervisor/administrative initiatives, enhancing collaboration and impact.
- Securing funded grants, specifically progression with deliverables
- Contribute to the field through high-level scholarship
 - Developing and sharing curricula
 - Presenting at regional and national conferences/ events
 - Publishing peer-reviewed journal articles

STEP III ONLY – Seminar Presentation Topic

- The Applicant will present a substantive public seminar on a topic related to one of their highlighted Supervisory/ Administrative Initiatives. Submit a 2-3 sentence summary that describes your seminar with your Step III portfolio submission. This summary will be used to promote your seminar with your colleagues.

SECTION FIVE - SERVICE

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 Applicant'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 Applicants)
- supervising of program interns

Step III Additional Guidance

- Multiple levels of in-depth service demonstrated including but not limited to:

- Service on MSU Extension or Institute-level task force(s) or committee(s) to contribute to strategic initiatives.
- Participation on article or grant review panels to support and evaluate scholarly work.
- Engagement in jointly funded projects that foster collaboration across departments or organizations.
- Representation of MSU Extension by leading or participating in statewide or local coalitions focused on community issues.
- Providing continued mentoring to colleagues and emerging professionals to support their growth and development.
- Leveraging experiences to strengthen Extension's presence and support within local, statewide, and national communities.