Keeping your bio-bib up to date and accurate is a very important component to ensuring your case goes through smoothly!
It is the official record, so it is essential that accomplishments discussed and credited during the review period are reflected on the bio-bib.

RB I-27 contains detailed instructions for completion of bio-bib:
https://ap.ucsb.edu/policies.and.procedures/red.binder/sections/%5B1_27%5D%20Instructions%20for%20Completion%20of%20the%20Bio-Bibliography.pdf

Templates also available on AP website under “Forms”: https://ap.ucsb.edu/forms/
These have recently updated; make sure to look at the newest ones to ensure you are adhering to the most current template/format.
Also, there is a separate template now available for SOE series
The best way to ensure your bio-bib is accurate and fully up to date is to update as you go along rather than try to update it at the time of review. This helps ensure that you won’t forget to include important work/activities done during the review period.

If you received feedback from reviewing agencies in prior reviews, please be sure to implement these changes, in order to avoid having the same errors continue to propagate through subsequent review cycles.

Also: keep ongoing records of items listed in the bio-bib. Not just for backup, but for context.
How to Prepare: Research

- **Research & Creative Activities**
  - Contribution
  - Role if co-authored
  - Journal/Press status
  - Save & organize PDFs
    - Linked works should contain evidence of publication, such as copyright or doi
  - Keep proof of in-press

Keep track of these key pieces of information that provide appropriate context to this work, e.g. acceptance rate of publication, significance of the volume that a chapter is published in, citation rate, etc… this info comes in handy for e.g. the self-assessment.
Consideration: at the end of each class term, read your evals, summarize them with a few bullet points, analyze the student feedback, and come up with plans for addressing legitimate/constructive criticism.

Also track informal mentoring that you engage in.
How to Prepare: Professional Activities
(and/or Scholarly Achievements for SOE Series)

• Professional Activities
  • Keep records of talks: when & where
  • Keep records of reviews, number and outlet
  • Indicate involvement with committees for associations
  • Report grants, percent share

Research publications will be folded into this section for SOE series; see the template on the Forms page on our website.
How to Prepare: Service

• Service
  • Committee work and responsibilities
    • Department
    • Division
    • Campus
    • System
    • Public
  • Assistant Professors: It’s OK to say no
    ✓ see Summer 2018 AP newsletter
Reminder for all sections of the bio-bib: Don’t delete sections that have no entries– just leave the headers in and leave the tables blank

If this is your first review at UCSB, then the “period from” encompasses the date of the CV at the time of your appointment case (typically the same CV you submitted as part of your application in UC Recruit), to the cutoff date of the current review period.
e.g. if the department submitted an appointment case in March 2020 for appointment effective 7/1/2020, then you should include any activities that have taken place since the CV that was submitted for your appointment case.
Common Errors: Biographical Info

- Inaccurate dates
  - “Last Update Filed”
    - refers to the cutoff date of the last bio-bib
  - “This update refers to the period”
    - means from the last cutoff date to the current cutoff date
Reminder: This is the ONLY section of the bio-bib that is cumulative, *regardless* of case type.

Q: How to capture key pieces of info like Volume, Page #s, etc…?
A: Can use APA-style citation in the “Title and Authors” column
Common Errors: Research

- Not providing complete information on publications or creative activities
  - indicate type of publication or creative activity
    - e.g.: peer reviewed journal article, solicited book chapter, co-curated exhibition, commercial music publication
  - complete and correct title, volume, page numbers, etc.
  - full list of authors/collaborators in proper order
  - Broken links, or links to venue website rather than to the complete, published version of the work. Make it shareable so all reviewers can see it.
Common Errors: Research, continued

- The following should **not** be included in research (include in Professional Activities instead):
  - patents
  - reprints of publications (including translations, unless conducted by the faculty member)
  - blogs
  - editorials
  - op-eds
  - reports to government agencies
  - GitHub software
  - ArXiv electronic papers

*Note: When dept memos do not provide the disciplinary standards for author order or do not clarify the relative role of co-authors it can affect evaluations and is an issue that faculty may want to address in self assessments.*

Even though these aren’t listed under Research, keep in mind that you ARE getting credit for these activities.

Also: carefully review your department’s letter to make sure they provide correct/appropriate context, e.g. status of venues of publications, clarity around author order significance in this discipline, or clarified YOUR role on the pub if co-authored
**PART II. TEACHING**

**Statement of Teaching Load:**
*(Please enter a statement of Departmental teaching load, including explanation of any course relief, and explain how the teaching load was met during the review period)*

(Annual Teaching List, available from Budget and Planning, may be substituted for the bio-bib list of catalog courses)

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<thead>
<tr>
<th>Catalog Courses</th>
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</table>

**Undergraduate Projects Directed**

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Project</th>
<th>Chair/Member</th>
<th>Year Proj Completed</th>
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</table>

**Graduate Degree Committees/MA Committees**

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Yr Deg Completed</th>
<th>Chair/Member</th>
<th>Optional Info (e.g. current employment)</th>
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</table>

**PhD Committees**

<table>
<thead>
<tr>
<th>Student Name</th>
<th>Yr Deg Completed</th>
<th>Chair/Member</th>
<th>Optional Info (e.g. current employment)</th>
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</table>

**Postdoctoral Scholars Supervised**

<table>
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<tr>
<th>Year</th>
<th>Name</th>
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</table>

**Other Teaching Contributions** *(e.g. course improvements, new courses, honors seminars, etc)*

<table>
<thead>
<tr>
<th>Year</th>
<th>Description</th>
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</table>
Common Errors: Teaching/Mentoring

- Not providing normative teaching load for department
- Not explicitly documenting how teaching load was met
  - Not providing explanation for any releases that were received
- Listing cross-listed courses as separate courses
- Not clearly identifying current graduate advisees & status

*Documentation needs to make clear the workload/role in mentoring undergraduates, advisees, etc.*

It is helpful if the self-assessment and/or dept letter provides a clear sense of what your workload was at ALL levels of teaching (incl mentoring) so reviewing agencies understand the context of these activities.
It is important to follow the format in the bio-bib template.

**OF NOTE:** The recent template update includes a new format of grants/contracts section. The updates include:

1. separated out new vs continuing grants, and
2. sum of respective totals

Q: What does “Candidate Share” actually mean, i.e. the budget ($) share doesn’t always reflect the proportional contribution, e.g. I might be in charge of a large grant where my own $ share is small/non-existent.

A: List the $ share on the bio-bib, but provide context on the actual workload in the self-statement.

Q: I’m the single PI on a grant, with sub-awards/contracts within this grant, which means a good portion of the $ simply flows through me/UCSB and ends up at other institutions. What amount do I list as “my share”?

A: The amount you control as PI, i.e. the full 100%
Key pieces of information to be sure to include:

- Role: e.g. Chair, or member?
- How long did you serve?
- What was the actual workload associated with this committee? e.g. meet only 1x a year to evaluate a small application pool, vs. meeting weekly to evaluate a large pool.
Common Errors: Professional Activities, continued

• The following should **not** be included in Professional Activities (include in Service instead):
  • Talks at UCSB (e.g., on panels created for students or community)
    • unless for a conference being held at UCSB

*Documentation needs to make very clear the competitiveness, selectiveness, significance of awards*
New column added to template: specifying the *level* of University Service

<table>
<thead>
<tr>
<th>PART IV. SERVICE</th>
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<tbody>
<tr>
<td>University Service (including administrative posts held)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Years</th>
<th>Position</th>
<th>Committee/Type of Service</th>
<th>Level</th>
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<tbody>
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| Public Service (including service to K-12 Education) |

<table>
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<tr>
<th>Years</th>
<th>Position</th>
<th>Type of Service</th>
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The Bio-bib Format: Service
Common Errors: Service

- Not specifying specific role in service
- Not specifying the years in the role
- Not indicating workload in supplemental materials (or in some cases, in biobib)
- Not specifying responsibilities/workload if Director of a campus center or facility
  - Not indicating if/how compensated

Please Note: A common mistake in service (and sometimes in PA) is treating items that have just begun (e.g., a position that started shortly before the Sept 15 cut-off) as a significant contribution during the period.

Similar to Professional Activities, be sure to clarify:
- Role: e.g. Chair, or member?
- How long did you serve?
- What was the actual workload associated with this committee?
The Dept Letter should provide appropriate context to your accomplishments; but your self-assessments are also an opportunity to provide appropriate context to particular areas of review.

e.g. maybe you tried out new teaching approach that didn’t work well-- explain what went well and what didn’t, and what you’ll change going forward, based on this.
Providing Context: Self Assessments

- **Research Statements**
  - Contribution, Impact, Implications

- **Service & Professional Activities**
  - Explain roles
  - Document responsibilities
  - Address selectivity
  - DEI (can also provide separate DEI Statement)

**RESEARCH STATEMENTS:**
- These are designed to help reviewing agencies understand significance, impact, and context of your work.
- So DO NOT simply summarize your research items one by one (it’s already on the bio-bib!)
- Instead, talk about how your work contributes to your field? What gaps does it address in the field? What would happen if society followed the recommendation of your research?
- Can also provide info about the status of outlets you publish in.
- Try to avoid using technical terms that someone outside your discipline might not fully understand/appreciate

**SERVICE/PROFESSIONAL ACTIVITIES**
- Make sure that any activities discussed are also listed on the bio-bib.
- Avoid using acronyms without first explaining what it stands for. Many acronyms comprise the same letters but stand for completely different things across different divisions/organizations.
- Provide proper context:
  - How time-consuming were the activities? How large was the Division (e.g. for divisional work)?
  - Prizes: how many people receive this? How often is it awarded?
- Do not assume that campus service requires no explanation. Roles for the same type of service can vary widely between departments, e.g. serving on the “graduate committee” may involve little time/effort in one department, but entail a huge amount of time/labor in a different department.
Contributions to Diversity, Equity, and Inclusion (DEI) can be folded into the various statements (teaching, research, etc), or be provided as a separate, stand-alone statement.
If you choose to do separate DEI Statement, make sure to explain these contributions within the 3 or 4 pillars of review areas (Teaching, Research, Service, Professional Activities)

Remember that contributions to DEI are valued, but they are not evaluated as a separate “pillar”.

• Diversity Statements
  • Range and extent of efforts, within the context of the four areas of review

• See Winter 2022 AP Newsletter on AP Website: *Contributions to Diversity, Equity, & Inclusion in Faculty Merit Reviews*
Providing Context: Self Assessments

- **COVID Statements**
  - Do not need to include personal/private information
  - Document disruptive impacts in any area of review
  - 1-2 pages
    - Used to ensure accomplishments are evaluated in light of opportunity

- See COVID Information & Resources on AP Website: *COVID Impact Statements* 

COVID impact statements allow reviewers to understand your accomplishments relative to the challenges of the current environment. Document disruptive impacts to your work so reviewers understand what your achievements were in light of these impacts.

General rule of thumb on self-assessment length: should not be more than 1-2 pages each.
Q & A