

University of Central Florida

Center for Distributed Learning

Annual Evaluation Standards & Procedures (AESP)

*Approved – Faculty Excellence – April 2017
Available for first use academic year 2017-18*

I. INTRODUCTION

The following Annual Evaluation Standards and Procedures comply with Article 10 (ratified December 8, 2015) of the 2015-2018 BOT-UFF Collective Bargaining Agreement. These standards and procedures will become effective on May 7, 2018.

II. CRITERIA

Instructional designers are evaluated on the following criteria:

1. Performance of Professional Responsibilities
2. Scholarship and Professional Development
3. Professional Service to CDL, the University, the Community, and the Profession

Generally, each instructional designer will be assigned 85% of his/her annual effort for Performance of Professional Responsibilities, 10% for Scholarship and Professional Development, and 5% for Service to CDL, University, Community, and Profession. It is expected that there will be some degree of variability in the assignment percentages due to individual assignment, strengths, and preferences.

III. STANDARDS

The standards for the criteria, both annual performance evaluation and promotion, are closely integrated in that the achievement of promotion is a result of successful additional individual effort in the same types of activities that are expected in the performance of assigned duties. The standards are further detailed below, and will be reflected in each instructional designer's unique Annual Assignment and Position Description (AA/PD).

First Criterion: Performance of Professional Responsibilities

Effectiveness in the performance of professional responsibilities that shows responsibility and continuing growth appropriate to rank:

- Demonstrated knowledge of professional responsibilities
- Created and maintained relationships with online faculty
- Facilitated best practices and quality in online learning
- Demonstrated growth of one or more fields of specialization as related to job assignment, as evidenced by scholarly contributions
- Demonstrated knowledge of learning theories, teaching strategies, and online pedagogy
- Demonstrated ability to create and facilitate professional development with unit personnel, the university community, and the community outside the university
- Demonstrated understanding of departmental and institutional goals
- Demonstrated leadership, initiative, and maturity of judgment
- Demonstrated working relationships with unit personnel, the university community, and the community outside the university

Unsatisfactory indicates below satisfactory for two or more consecutive evaluations or failure to comply with written instructions for improvement from supervisor or associate department head.

Conditional indicates below satisfactory for one evaluation or failure to comply with written instructions for improvement from supervisor or associate department head.

Satisfactory indicates performance that is *at expectation* for the assignment. In order to achieve “Satisfactory” the instructional designer must accomplish a minimum of five (5) of the seven (7) following primary bulleted items (including sub-bullets):

- Exhibits knowledge of professional responsibilities
 - learns professional responsibilities
 - shows increasing levels of competence
 - increases knowledge of production, course design, and CDL procedures
 - assists in and supports professional development
 - mentors and trains with experienced ID to build and improve skills
- Identifies and develops mastery of field of specialization
- Applies knowledge of learning theories, teaching strategies, and online pedagogy to improve quality of online instruction through individual consultations, course development, and communication with existing online faculty
- Applies knowledge of learning theories, teaching strategies, and online pedagogy to create and support faculty in organized professional development offerings (e.g., IDL6543, IDL7000, ADL5000, TLC, Faculty Seminars in Online Teaching, BlendKit, PAL6000, etc.)
- Understands and meets UCF and CDL goals, objectives, and follows procedures, as they relate to activities and assignments, as defined by the unit and stated on the AA/PD

- Demonstrates growth of leadership, initiative, and maturity of judgment appropriate to rank
 - Volunteers for projects and assignments to further skill development
 - Accepts project assignments and seeks assistance when needed
- Demonstrates working relationships with unit personnel, the university community, and the community outside the university
 - Maintains positive and productive working relationships with colleagues and faculty in the UCF community through communication and timely support in an efficient and systematic manner
 - Participates in discussions of relevant professional issues within the unit, shares resources among co-workers to promote unit knowledge of current trends and issues

Above Satisfactory indicates performance that is *above expectation* for the assignment.

The instructional designer will receive a rating of “Above Satisfactory” if the person meets the standards for a “Satisfactory” rating and attains three (3) of the following:

- Demonstrates highly competent, self-directed performance of professional responsibilities
- Applies mastery of one or more fields of specialization to advance activities such as professional development, projects, and discussions within professional organizations
- Frequently contributes (ideas, suggestions, improvements, procedures) in ways that move the CDL mission forward
- Frequently contributes (ideas, suggestions, improvements, procedures) in ways that move the UCF Strategic Plan forward
- Frequently demonstrates leadership, initiative, or maturity of judgment in leading or participating in projects, initiatives, meetings, and mentoring activities
- Frequently exhibits high levels of professional behavior with CDL personnel, the university community, and the general public as documented in IDL6543 evaluations, documented communications from online faculty, etc.
- Maintains positive and productive working relationships with those outside of the UCF community, as noted in documented communication(s)
- Meets goals and expectations for professional growth as defined by the unit and stated on the AA/PD (or alternate goals negotiated with the supervisor)
- Receives one letter (or email) of recognition from a UCF colleague which acknowledges the instructional designer’s role in a contribution to the UCF community

Outstanding is reserved for *exceptional* performance. It indicates excellence in the profession and adherence to the highest standards.

The instructional designer will receive a rating of “Outstanding” if the person meets the standards for an “Above Satisfactory” rating and in addition attains two (2) of the following:

- One or more letter(s) of recognition from a colleague/organization outside of UCF appropriate to position and field that identifies the instructional designer's role in a significant contribution to the field
- Multiple letters of recognition or acknowledgement from UCF online faculty, college or department administrators which document a significant contribution and details the individual impact of the instructional designer
- Documenting significant involvement in a project that exhibits a strategic impact on local community and beyond
- Awarded a grant which supports the pursuit of professional responsibilities
- Exceeds goals and expectations for professional growth as defined by the unit and stated on the AA/PD (or alternate goals negotiated with the supervisor)

Note: Should an instructional designer receive an award from the division, university, or professional community that recognizes individual achievement in instructional design (e.g., Excellence in Instructional Design, individual IT&R award, Davis Productivity award), that alone shall be sufficient to satisfy the requirements of the Outstanding criteria. A second outstanding achievement, as listed above, shall not be required.

In addition to the criteria listed above for the various rating categories, the evaluator should provide written comments regarding the instructional designer's performance in this area. The written comments should help explain or justify the rating, provide context, and provide useful feedback for future performance.

Performance of Professional Responsibilities will be further subdivided and rated separately by the supervisor. These individual ratings will be figured into the overall rating according to the percentage of time allotted to that activity in the instructional designer's AA/PD, as described in the Ratings section below.

Second Criterion: Scholarship and Professional Development

(2a) Scholarship includes contributions to the discovery of new knowledge in instructional design, online teaching and learning, development of new educational techniques, and other forms of creative activity in higher education.

Evidence of research and other creative work recognized by the academic and/or professional community shall include but not be limited to:

- Published or in-press manuscripts in peer-reviewed publications (e.g., journal, book)
- Award, special honors earned that are related to one's scholarly activities (e.g., Best in Track at a research conference)

- Presentation(s) at conferences and professional events
- Grant activities in progress or completed
- Research, special projects, or studies in progress or completed

(2b) Professional development activities are expected to progress with rank from developmental, to contributing, to guiding, to facilitating, and shall include but not be limited to:

- Awards, special honors earned in professional development-related endeavor
- Continuing education (e.g. MOOCs, courses)
- Attendance and participation at conferences and workshops
- Applying knowledge learned at conferences and workshops to influence departmental projects and/or activities (e.g., replicating or building upon a study presented at a conference, implementing a strategy learned at a conference)
- Degrees or certificates earned during this evaluation period
- Demonstrated knowledge of current developments in the instructional design profession

· *Unsatisfactory*

Fails to demonstrate, contribute or offer any measurable achievement in scholarship and professional development activities appropriate to subject field(s) for two or more consecutive evaluations or in relation to written instructions for improvement from supervisor or associate department head.

· *Conditional*

Fails to demonstrate measurable achievement in scholarship and professional development activities appropriate to subject field(s) for one evaluation or in relation to written instructions for improvement from supervisor or associate department head.

· *Satisfactory*

Demonstrates achievement in the above (2a) scholarship and (2b) professional development activities by fulfilling at least one instance of one item from 2A and one instance of one item from 2B (e.g., presenting a session at a conference, and taking an ID-related MOOC).

· *Above Satisfactory*

Demonstrates high levels of achievement in the above (2a) scholarship and (2b) professional development activities by fulfilling at least one instance of one item from 2A and one instance of one item from 2B; and at least one additional instance of one item from either 2A or 2B (e.g., presenting a session for two different conferences, and taking an ID-related MOOC).

· *Outstanding*

Demonstrates exceptional levels of achievement in the above (2a) scholarship and (2b) professional development activities by fulfilling at least one instance of one item from 2A and one instance of one item from 2B; and at least three other instances of items from either 2A or 2B (e.g., publishing two articles, presenting two different sessions at a conference, and taking a MOOC).

Note: Receiving an award from the college, university or professional community that recognizes achievement in scholarship and/or professional development (e.g., “Best in Track” conference presentation in an approved and accredited organization, award for conference paper, research awards) shall be strongly considered in the awarding of an “outstanding” rating.

In addition, the evaluator should provide written comments regarding the instructional designer’s performance in this area. The written comments should help explain or justify the rating, provide context, and provide useful feedback for future performance.

Third Criterion: Service to CDL, University, Community, and Profession

(3a) Service extends professional or discipline-related contributions to CDL, University, and local, state, national, and international communities and shall include *but not be limited to*:

- Participation in recognized academic and professional organizations (elected office, committee chair, committee member, editorial board, conference reviewer, journal peer reviewer, etc.)
- Planning, organizing and conducting workshops, institutes, seminars, conference programs, or other continuing education projects
- Making professional contributions to community groups, courses or lectures given at educational institutions

(3b) Consulting or other special service to the University through participation in the governance processes of the University and CDL that shall include *but not be limited to*:

- University committees
- CDL committees
- Campus organizations

· *Unsatisfactory*

Fails to demonstrate, contribute or offer any measurable achievement in service activities or contributions for two consecutive evaluation periods.

· *Conditional*

Fails to demonstrate measurable achievement in service activities or contributions for one evaluation period.

· *Satisfactory*

Demonstrates achievement in the above service activities by fulfilling one instance of one item in 3a and one instance of one item in 3b (e.g., serving as a conference reviewer for one conference, and serving on a university-level taskforce).

· *Above Satisfactory*

Demonstrates high levels of achievement in the above service activities by fulfilling one instance of one item in 3a and one instance of one item in 3b, plus at least one additional instance from either 3a or 3b (e.g., serving as a conference reviewer for two different conferences, plus serving on a university-level taskforce).

· *Outstanding*

Demonstrates exceptional levels of achievement in the above service activities by fulfilling one instance of one item in 3a and one instance of one item in 3b, plus at least three additional instances from either 3a or 3b (e.g., serving as a conference reviewer for three different conferences, organizing a workshop, plus serving on a university-level taskforce).

In addition, the evaluator should provide written comments regarding the instructional designer's performance in this area. The written comments should help explain or justify the rating, provide context, and provide useful feedback for future performance.

Ratings:

The instructional designer is given one of the following numerical ratings in each of the assigned areas:

0 = U (Unsatisfactory)

1 = C (Conditional)

2 = S (Satisfactory)

3 = AS (Above Satisfactory)

4 = O (Outstanding)

Overall Rating:

For a standard percentage assignment (85%, 10%, 5%), the overall rating is based upon the rating of the first criterion: performance of professional responsibilities. However, scholarship and service are expected activities for all instructional designers. Therefore, an overall rating of "Outstanding" can only be achieved if rated "Satisfactory" or above in scholarship and service. The following scale provides the range of ratings that represent the sum of combined rated criteria:

0.00 – .49 = U (Unsatisfactory)

.5 – 1.49 = C (Conditional)

1.5 – 2.49 = S (Satisfactory)

2.5 – 3.49 = AS (Above Satisfactory)

3.5 – 4.00 = O (Outstanding)

Because there can be variability in the assignment of duties percentages, an overall rating is based on the sum of ratings in the three criteria above, weighted according to the instructional designer's percentages in the AA/PD.

Example: An Instructional Designer with 70% allotted to Performance of Professional Responsibility, 20% allotted to Scholarship and Professional Development, and 10% allotted to Service, a hypothetical overall rating would be:

$(3(\text{AS}) \times .70=2.1) + (2(\text{S}) \times .20=.40) + (3(\text{AS}) \times .10 = .30) = 2.8$ (Above Satisfactory)

IV. PROCEDURES

The procedures for annual evaluation include three main components:

- 1) **Annual accomplishment report (AAR)** for the current evaluation period. This is completed by the employee at the end of the evaluation period.

The AAR should *briefly* put activities in context and explain their importance to CDL and its mission. The accomplishments should not be merely a report of typical duties as outlined in the Annual Assignment/Position Description (AA/PD) but should highlight the strengths, major goals accomplished, or innovative methods used to execute the assigned duties. There is not one single, uniform format for the AAR; however, it should parallel the AA/PD (described in #2) and include the criteria spelled out above in the "Standards" section and on the Annual Performance Review form (described in #3).

The AAR serves not only as a reminder of accomplishments for the immediate supervisor to consider, but also to aid the Associate Vice President in assessing performance of professional responsibilities, scholarship, and service.

- 2) **Annual Assignment and Position Description (AA/PD)**. This document is completed jointly by the employee and supervisor and is the point at which the current evaluation period and the next evaluation overlap. At the conclusion of the current evaluation process, the AA/PD for the next evaluation period is completed jointly by the employee and their supervisor.

For purposes of the annual evaluation, the assigned duties will be described on the AA/PD and will include performance of professional responsibilities, scholarship and professional development, and service. Individual position descriptions are agreed upon between the employee and supervisor, with input from the Associate Department Head. The position descriptions should include detail about job duties or responsibilities and specific goals. This

can (and should) be modified by the employee and supervisor at any time during the evaluation period if duties and responsibilities of the employee change.

3) **Faculty Annual Performance Review** for the current evaluation period. The procedure is as follows:

1. The employee completes the Faculty Annual Performance Review as a self-appraisal and submits it to the supervisor.
2. The supervisor considers the contents of the employee's Annual Performance Review, AA/PD and AAR, and proposes recommendations for performance ratings on the Performance Review.
3. The Annual Performance Review and other supporting documents are forwarded to the Associate Vice President for approval, who will solicit information from the supervisor and Department Head as needed. It is returned to the supervisor.
4. The employee discusses the evaluation with the supervisor prior to it being finalized and placed in the employee's evaluation file.
5. It shall be signed and dated by the employee.
6. The employee may attach a concise comment to the evaluation if desired.
7. A copy of the evaluation shall be provided to the employer.
8. Upon written request from the employee, the supervisor and other evaluators shall endeavor to assist the employee in addressing any performance deficiencies.

If the employee disagrees with the evaluation results, the employee shall have 20 working days to submit a petition to the supervisor, providing documentation that supports the employee's position in the matter. The supervisor shall have 20 working days to provide any information deemed appropriate to the Associate Vice President. Once the petition and any supervisor response have been received by the Associate Vice President, the Associate Vice President shall decide the matter and that decision shall be final.

Notwithstanding the above, the employee shall maintain the absolute right to submission of a formal grievance using normal University grievance procedures.

These procedures are based on Article 10 of the BOT-UFF Collective Bargaining Agreement from <http://www.collectivebargaining.ucf.edu/>

Modified: 1/11/2017