

# Annual Evaluation Standards and Procedures (AESP)

GUIDANCE FOR ANNUAL REPORT PREPARATION

*Department of Hospitality Services  
Rosen College of Hospitality Management  
University of Central Florida*

Developed by faculty committee in Fall 2019

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(17 for; 0 against; 4 abstain).

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The responses to FE's feedback were approved by Hospitality Services Department faculty email vote, as recommended by FE, on 03/31/2021

(21 for; 0 against; 3 abstain).

Approved by Faculty Excellence on May 21, 2021.

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## INTRODUCTION

The Hospitality Services (HS) Department Annual Evaluation Standards and Procedures (AESP) is a work assignment and evaluation system designed for performance appraisal of lecturers/instructors and tenure track faculty (i.e., tenure earning and tenured faculty) housed within the Hospitality Services (HS) Department. The plan has multiple tracks differentiated by faculty classification, course load, and assignment of effort to teaching, research, and service activities. The objectives of the AESP are to:

- Provide a range of work assignments (in consultation with the Department Chair and the Dean) that permit tenure track faculty members to be placed on a track that best matches their teaching and research capabilities, professional goals, and interests, consistent with the mission of the department.
- Align the performance evaluation with the promotion and tenure processes.
- Promote high-quality teaching, research, and service by HS faculty members.

## PART I - WORKLOAD TRACKS

### **Evaluation Weights by Assignment Track**

Each year, the HS Department Chair will assess each faculty member's professional performance based on teaching, research, and service activities, as well as any other assigned duties. Overall evaluations will be determined by weighting performance on each of the components by the faculty member's formal assignment of effort on each. Table 1 contains the target weights for teaching, research, and service for each workload option based on course assignments (3 SCH courses or equivalent) over a regular 9-month annual contract.

Track D is the typical/regular workload assignment for tenure track HS faculty, and Track A is the typical/regular workload assignment for lecturers/instructors. When a faculty requests a different workload assignment, the Department Chair, in consultation with the Dean, will determine the appropriateness of the requested workload assignment. The determination will be based upon the relationship between the requested assignment and the college's mission and goals, the needs, the resources, the professional development, the faculty member's past performance, and the proposed action plan of the faculty. The expected outcome (i.e., minimum requirement) for the requested workload assignment will be discussed and agreed upon by the department chair, the Dean, and the faculty, and it will be based upon the actual workload for a regular 9-month annual contract.

If faculty complete summer teaching in the preceding year, then this must be included for evaluation purposes but not in determining their workload. The teaching loads on workload assignments do not include course buyouts and course releases. This means that if a faculty member receives a course release (i.e., due to the duties other than formal assignments that qualify for a course release), then the faculty member's performance will be evaluated based on the workload option that they chose at the beginning of the academic year.

**Table 1**  
**Evaluation Weights by Workload Assignment**

<b>Professional Activity</b>	<b>Track A 8 Courses</b>	<b>Track B 7 Courses</b>	<b>Track C 6 Courses</b>	<b>Track D 5 Courses</b>	<b>Track E 4 Courses</b>	<b>Track F 3 Courses</b>	<b>Track G 2 Courses</b>
Teaching	80%	70%	60%	50%	40%	30%	20%
Research	0%	20%	30%	40%	50%	60%	70%
Service	20%	10%	10%	10%	10%	10%	10%

(i) Each course assigned is equal to a 10% workload. (ii) Track A is for lecturers and instructors only.

**Evaluation of Other University Duties**

Although expectations are that most faculty members’ time will be allocated in the proportions given in Table 1, it is recognized that circumstances may arise, which warrant variations in the percentages under each option. Ultimately, each faculty member’s annual performance evaluation will be based upon the actual workload for that evaluation period. In those cases, where other duties are a significant part of evaluating a faculty member’s performance, the faculty member, in consultation with the Chair, will determine alternate weights and include them on the faculty member’s assignment form for all categories at the beginning of each academic year.

**Workload Assignment and Change Procedures**

1. Workload assignments and changes in workload assignments will be made in accordance with the most current UCF-UFF Collective Bargaining Agreement (CBA). The workload assignment procedure is summarized in Appendix 1.
2. Faculty members may appeal changes in workload assignments in accordance with the most current UCF-UFF CBA.

**Relationship between Annual Evaluation and Tenure/Promotion**

The result of a faculty member’s annual evaluation in the Rosen College of Hospitality Management is one of the numerous components that are examined in the University Tenure and/or Promotion process. Therefore, it should not be construed that achieving a *Satisfactory* or higher rating in any or all annual evaluations will automatically result in a positive tenure or promotion decision.

**Modifications of the Annual Evaluation and Standards Procedures**

The plan may require periodic changes and will be revised in accordance with the most current UCF-UFF CBA and changes in the Department and College missions and objectives.

**Data to be included in the Spring Annual Report**

Evaluation periods are delineated in the CBA, which typically begin at the end of the first week in August and continue through the end of the first week in May of the following year. Teaching and Service contributions are to be reported for the most recent academic year, which will comprise the previous Fall, Spring, and Summer (if relevant) terms. Research contributions on the section I are to be reported for the most recent three academic years to ensure longer-term authorship and grant activities are fully taken into consideration. Research contributions on section II are to be reported for the most recent past academic year.

## PART II – EVALUATION PROCESS AND STANDARDS

### **Overview**

After the end of the evaluation period, the HS Chair shall evaluate each faculty member's performance. The evaluation shall follow the standards and procedures described in this document, the most current UCF-UFF Collective Bargaining Agreement, and the Annual Assignment of Effort provided to the faculty member at the beginning of the year or as modified during the year. Annual Assignments of Effort vary depending upon whether the faculty member is in a tenured or tenure earning or non-tenure earning position classification. Additional effort variation will occur based upon the workload assignment (number of courses) for the faculty member.

Each year, by or prior to the established deadline, every faculty member shall submit an annual report that documents the faculty member's activities and accomplishments in each area of assignment for the relevant time window (prior year for teaching, service, and research activities specified in Section II, Table 4; prior three academic years for research activities specified in Section I, Table 4). It is the responsibility of the faculty member to thoroughly document activities and accomplishments in the annual report.

### **General Guidelines: Assessment of Overall Performance**

Each faculty member will be given an overall performance assessment based on the ratings earned in teaching, research, and service activities, as well as other professional duties. The overall rating will be determined using the percentages assigned to each activity as outlined in Table 1. The overall evaluation rating and the rating for each of the three areas of professional activity will be based on the following scale.

<b>Outstanding:</b>	The faculty member receives 3.20 to 4.00 points in total.
<b>Above Satisfactory:</b>	The faculty member receives 2.80 to 3.19 points in total.
<b>Satisfactory:</b>	The faculty member receives 2.40 to 2.79 points in total.
<b>Conditional:</b>	The faculty member receives 2.00 to 2.39 points in total.
<b>Unsatisfactory:</b>	The faculty member receives 0.00 to 1.99 points in total.

The overall rating is a weighted average of the points earned across teaching, research, and service activities (and other activities, if applicable). The overall rating based on the weighted average will be calculated using the Excel sheet attached.

### **Due Date for Faculty Annual Report**

The faculty annual report shall be due by the date specified in the CBA.

## PART III – EVALUATION OF TEACHING PERFORMANCE

### Overview

The time frame for the teaching portion of the evaluation is one academic year. Each faculty member will be evaluated for teaching based on the standards in Table 2. Each faculty member is expected to provide high-quality instruction. The evaluation of teaching performance shall include consideration of the individual's effectiveness in imparting knowledge and skills, stimulating students' critical thinking and creative abilities, the development or revision of curriculum and course structure, effective student performance, evaluation procedures, and adherence to accepted standards of professional behavior in meeting teaching responsibilities to students.

The learning objectives of each course, the means of assessing learning objectives, and the actual outcomes of the assessment should be evaluated as part of the teaching performance. The Department Chair will take into account the teaching portfolio of each faculty member, which may include but not be limited to, class notes, syllabi, student exams and assignments, and any other materials relevant to the teaching assignments.

The teaching evaluation should take into account any relevant materials, including the Student Perception of Instruction (SPI) survey results and classroom visits or observations by the Department Chair, and other teaching-related activities, including but not limited to, student advising, new course development, course revisions, development of innovative teaching methods, and using multiple types of learning assessments.

Please refer to Table 2 for the full list of teaching standards and their corresponding base points. The overall evaluation of teaching activities will be based on the following scale.

<b>Outstanding:</b>	The faculty member receives 3.20 to 4.00 points in total.
<b>Above Satisfactory:</b>	The faculty member receives 2.80 to 3.19 points in total.
<b>Satisfactory:</b>	The faculty member receives 2.40 to 2.79 points in total.
<b>Conditional:</b>	The faculty member receives 2.00 to 2.39 points in total.
<b>Unsatisfactory:</b>	The faculty member receives 0.00 to 1.99 points in total.

<b>Table 2: Teaching Standards</b>	
<b>Teaching Standards</b>	<b>Base Points</b>
Annual Average of Student Perceptions of Instruction (SPI) Evaluations The overall effectiveness of the instructor score must be used for each class when calculating the overall SPI score.	
4.00-5.00	1.65
3.75-3.99	1.30
3.25-3.74	1.00
2.75-3.24	0.65
Chair of thesis/dissertation committee per student (max 1.0 points per year)	0.50
Member of thesis/dissertation committee per student (max .60 points per year)	0.30
Chair of undergraduate honors thesis per student (max .60 points per year)	0.30
Member of undergraduate honors thesis per student (max .30 points per year)	0.15
New course preparation (per class; never taught before)	0.30
Course supervisor/mentor/leader (mentoring new instructor, etc.; per course max .60 points per year)	0.15
Large class size (graduate - per class) 25+ students	0.15
Large class size (undergraduate - per class) 75+ students	0.15
Coordination of College event (i.e., Conference, Career Fair)	0.30
Peer observation of teaching (giving/receiving formal written feedback) (max 0.10 points per year)	0.05
Efforts leading to the development of a degree program/certificate program (with written evidence)	0.30
University recognized class designation with objective evidence (per class) (max 0.50 points per year)	0.10
Clear evidence of updates to courses, including syllabi and content (per class) (max .60 points per year)	0.15
Multiple types (at least 4) of learning assessments used per class (max .60 points per year)	0.15
Employment of different teaching methodologies across per class (max .60 points per year)	0.15
Student Mentoring (Works with at least 1 RAMP, LEAD Scholar, or Honor student) (per student)	0.15
Department/College approved independent study (per student up to 2 students)	0.15
Active participation/presentation at a teaching and learning conference/workshop (per event)	0.15
Special teaching and curriculum development assignments outside the Rosen College	0.30
Teaching Award (Current academic year only)	
External Teaching award from International Council on Hotel, Restaurant, and Institutional Education (ICHRIE) or other respected institutions	1.00
University Teaching Award	1.00
College or Departmental Teaching Award	0.65
Student Association Teaching Award	0.30
<b>Total Points allowable in this section (Teaching)</b>	<b>4.00</b>

## **PART IV – EVALUATION OF RESEARCH AND OTHER SCHOLARLY ACTIVITIES**

### **Overview**

Faculty with a research assignment will be evaluated for research and other scholarly activities based on the standards listed in Table 4. The research publications and grant components of this assignment dimension will be evaluated on the basis of publication and grant activity over the most recent three-year period. Therefore, the faculty member must provide information about his or her research activities for Section I over the most recent three-years.

The Department Chair shall consider the full range of research and scholarly activities and the contribution of accomplishments. Evidence of research and other creative activities shall include, but not be limited to, published books, articles, and papers in professional refereed journals, papers presented at meetings of professional conferences, funded grant activities, and research and creative activities that have resulted in publication, display, or performance. The evaluation shall include consideration of the faculty's research quality and productivity during the evaluation period, and other creative programs and contributions recognized by the academic and professional community.

Please refer to Table 4 for the full list of research standards and their corresponding base points. The overall evaluation of research activities will be based on the following scale.

<b>Outstanding:</b>	The faculty member receives 3.20 to 4.00 points in total.
<b>Above Satisfactory:</b>	The faculty member receives 2.80 to 3.19 points in total.
<b>Satisfactory:</b>	The faculty member receives 2.40 to 2.79 points in total.
<b>Conditional:</b>	The faculty member receives 2.00 to 2.39 points in total.
<b>Unsatisfactory:</b>	The faculty member receives 0.00 to 1.99 points in total.

**IMPORTANT:** Tenure track faculty members must follow the procedure below to calculate the points for Research and Other Scholarly Activity Standards.

1. If the total points from Research and Other Scholarly Activity Standards is below 2.40, then the actual points earned will be used for Research and Other Scholarly Activity Standards.
2. If the total points from Research and Other Scholarly Activity Standards are at or above 2.40, then the following procedure will be used.
  - If a tenure track faculty member earns 1.00 point or above on average per year over the most recent three academic years from Section I of the Research and Other Scholarly Activity Standards, then the actual points earned from Research and Other Scholarly Activity Standards (including Section I and II) will be used for evaluation purposes.
  - If a tenure track faculty member earns below 1.00 point on average per year over the most recent three academic years from Section I of the Research and Other Scholarly Activity Standards, then the faculty member will receive 2.39 as the total points from Research and Other Scholarly Activity Standards.

### **Sources of Information**

In the evaluation of research activity, the Department Chair will assess the caliber of the faculty member's most recent three-year publication and grant record, as measured by the categories of the journals in which those publications appear and the sources of grant funding.

Newly hired tenure track faculty members with no credit towards tenure will be evaluated from the academic year in which they started their employment at UCF, and their evaluation will be based on identifiable research activities at UCF (e.g., publications, journal submissions, papers that are to be revised and resubmitted to the same journal, working papers, etc.). Thus, the first two years' annual evaluations for research activities for newly hired tenure track faculty members with no credit towards tenure will be at the discretion of the Chair. The expectation is an established research pipeline (i.e., research and grant submissions with UCF affiliation) that would lead to earning 1.00 point or above on average per year over three academic years since joining Rosen College from Section I of Research and Other Scholarly Activity Standards.

Newly hired tenure track faculty members who receive credit towards tenure and promotion will have an evaluation window that includes those years of tenure credit and the research publications therein. In addition, the Department Chair will rely on the information provided in the faculty member's annual evaluation portfolio to gauge the quality and quantity of the additional research activities engaged in during the annual evaluation period.

### **Calculation of Final Points for Different Workload Options**

Track D is the typical/regular workload assignment for tenure track HS faculty. The research effort required for track D is 40%, which is equal to *4 points*. Four points is calculated by taking 12 total points for the overall evaluation (4 points for research, 4 points for teaching, and 4 points for service).

10% change in research efforts on Track D results in a 1.2 points differential (12 total points x 10% in research points output). In other words, an increase or decrease of 10% in research efforts increases or decreases research points output by 1.2 points. This differential is estimated by taking 12 total points for the evaluation and multiply by the 10% change in effort (Each course assigned is equal to 10% workload).

Table 3 provides *an example* for a faculty who earns 3 points from the research activities.

**Table 3: Sample Calculation for Different Workload Options**

	Track B	Track C	Track D	Track E	Track F	Track G	Explanation
<b>Research Effort</b>	20%	30%	40%	50%	60%	70%	The “%” represents the effort in research.
<b>Maximum Expected Research Output</b>	1.60	2.80	4.00	5.20	6.40	7.60	10% in efforts increases research points output by 1.2 Points.
<b>Actual Points Earned</b>	3.00	3.00	3.00	3.00	3.00	3.00	This is an example assuming that the faculty member earned 3 points from the research section.
<b>Standardized % Score</b>	188%	107%	75%	58%	47%	39%	The actual points must be standardized when the research effort is not 40% with the following: <i>Actual Points Earned/Expected Research Output</i>
<b>Standardized Points</b>	7.50	4.29	3.00	2.31	1.88	1.58	When the research effort is not 40%, then the standardized points are calculated with the following: <i>Standardized % Score x 4</i>
<b>Final Points for Research</b>	1.50	1.29	1.20	1.15	1.13	1.11	This number is the final point the faculty will get for the AESP research section. This is calculated: <i>Research Effort x Standardized Points</i>

For example, consider two tenured full professors. The typical workload for RCHM tenured faculty is Track D. If one professor (Dr. Teacher) is approved for Track B, this professor’s expectations will change. Additional courses would be assigned, and less research output would be expected. If the second professor (Dr. Researcher) is approved for Track G, fewer courses are assigned, but higher research output is expected. In the situation detailed in Table 3, both professors published refereed journal articles in ShanghaiRanking’s journal list and earned three base research points (see Table 4). When these base research points are standardized to account for the different tracks, Dr. Teacher will receive 1.50 total research evaluation points, and Dr. Researcher will receive 1.11 total research points. This outcome promotes fairness in the evaluation process as the standardized points are based on the various tracks’ expected output. An example is also provided in the appendix to show how points can be earned and computed for evaluation purposes.

**HS Department Journal Lists**

Journals eligible for inclusion in the Faculty Member Annual Evaluations include those in HS Department Tier 1 and HS Department Tier 2 journal lists (i.e., Scopus Indexed Journals and Shanghai Ranking’s journal list). HS Department Tier 1 journals feature those in the SCOPUS 1<sup>st</sup> quartile for the “Tourism, Leisure and Hospitality Management” category and Shanghai Ranking’s journal list for “Hospitality and Tourism Management” category. HS Department Tier 2 journals feature those in the SCOPUS 2<sup>nd</sup> quartile for the “Tourism, Leisure and Hospitality Management” category.

Each listing will be updated annually by the Associate Dean of Research and Administration in agreement with the Dean and Department Chairs. In addition, HS Faculty can nominate two “additional” journals for inclusion in each Tier in the April Department Meeting by secret ballot. This process will be undertaken annually. If faculty publish in high-impact journals outside of Tier 1 and Tier 2, it is essential that the journals are SSCI (or their subject equivalent) and have a CiteScore at or above the minimum in Tier 1. Such publications will be considered Tier 1 publications. When a faculty member submits a manuscript to a journal and if the ranking of that journal changes after the submission, then that journal’s ranking on the date of submission will be considered by the department chair.

<b>Table 4: Research and Other Scholarly Activity Standards</b>	
	<b>Base Points</b>
<b>SECTION I (past 3 academic years; based upon TLH list in SCOPUS and H&amp;T Management list in ShanghaiRanking; each article can only be counted once)</b>	
Accepted and/or published refereed journal article in ShanghaiRanking's journal list	1.50
Accepted and/or published refereed journal article in SCOPUS journal list (Tier 1)	1.00
Accepted and/or published refereed journal article in SCOPUS journal list (Tier 2)	0.75
Accepted and/or published refereed journal article (per article)	0.50
Author/co-author of a published scholarly book	1.00
Author of a published scholarly book chapter or case study	0.50
Principal Investigator/Co-Investigator of external grant/contract funded (per grant, per year)	
Below \$10,000	1.00
\$10,001 to \$25,000	1.25
\$25,001 to \$50,000	1.50
\$50,001 and above	2.00
(Contributors get 50% of the points listed above)	
<b>SECTION II (past academic year)</b>	
Principal Investigator/Co-Investigator external grant/contract submitted	0.15
Principal Investigator/Co-Investigator internal UCF or college grant funded (per grant)	0.30
Refereed paper presentation (per presentation)	0.15
Refereed poster presentation (per presentation)	0.10
Research awards (current year only; per award)	
Best paper/outstanding paper award from a journal (per paper)	0.65
Best paper/outstanding paper award from a conference (per paper)	0.35
University research award (per award)	1.00
College or Departmental research award (per award)	0.65
External research award (Lifetime research award, etc.) (per award)	1.00
Scholarly work cited by other scholars during the evaluation period (per citation)	0.03
Industry publication such as a report, an interview, newspaper, and magazine article	0.10
Non-funded Community Research Project (per project)	0.15

<i>Total points allowable in this section (Research - Sections I and II)</i>	<b>4.00</b>
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## PART V – EVALUATION OF SERVICE

### Overview

The service component of each faculty member’s assignment will be evaluated annually by the Department Chair based on the standards in Table 5. Internal, community, and industry service are the responsibilities of all faculty members. Faculty should demonstrate a willingness to support the university, college, and department through service and leadership roles. Service activities at the university should include various roles (e.g., member, chairperson) at various levels of service (e.g., department, college, university, industry, local, regional, national, and international).

Service is expected of all faculty members. However, the type and amount of service activity may vary based on an individual’s professional focus. Please refer to Table 5 for the full list of service standards and their corresponding base points. The overall evaluation of service activities will be based on the following scale.

<b>Outstanding:</b>	The faculty member receives 3.20 to 4.00 points in total.
<b>Above Satisfactory:</b>	The faculty member receives 2.80 to 3.19 points in total.
<b>Satisfactory:</b>	The faculty member receives 2.40 to 2.79 points in total.
<b>Conditional:</b>	The faculty member receives 2.00 to 2.39 points in total.
<b>Unsatisfactory:</b>	The faculty member receives 0.00 to 1.99 points in total.

<b>Table 5: Service Standards (active participation during the year)</b>	
	<b>Base Points</b>
<b>University and College Service and Awards</b> (per committee, organization, award, or event)	
University Committee Leadership (i.e., P&T committee chair)	1.30
University Committee Member	0.65
College Committee Leadership	1.00
College Committee Member	0.50
Department Committee Leadership	0.65
Department Committee Member	0.30
Voluntary university/college service activities/events - (student events and gala dinners)	0.30
Graduation ceremony (per event)	0.10
Faculty advising of student organization (per organization)	0.30
<b>Industry and Community Service and Awards</b> (per committee, organization, activity, or event)	
Academic, Industry, or Community Association/Organization Leadership/Keynote speech	0.65
Academic, Industry, or Community Association/Organization Member/Panel/Advisory Board	0.30
Active participation in an industry/community event	0.65
Industry/Community Service/Scholarship Awards	0.65
Industry print or electronic media report, newspaper/magazine article, blog (per each report/article) (max .60 pts. per year)	0.15
<b>Service to the Academic Profession</b> (per committee, organization, activity, or event)	
Editor of a book of academic papers/conference proceedings	0.65
Editor of an academic journal (per issue – maximum 2 points)	0.65
Guest Editor/Associate Editor of a Special Issue for an academic journal (per issue)	0.65
Editorial Board Member or Associate Editor of an academic journal (per journal – maximum .60 points)	0.30
Ad-hoc reviewer for an academic journal (per journal – maximum .60 points)	0.15
Chair/Co-Chair of national/international research/academic/industry conference	0.65
Conference Committee Member (per conference – maximum .30 point)	0.15
Reviewer for a Conference (per conference – maximum .30 point)	0.15
<i>Note: Committees must be active and meet at least once each semester, business minutes required</i>	
<b>Total points allowable in this section (Service)</b>	<b>4.00</b>

**Other University Duties**

Other university duties are evaluated based on contractual arrangements between the faculty member, the Chair, and the Dean. This item is uncommon for regular faculty members and will be determined case by case based on the extent of the faculty member’s fulfillment of the contractual arrangements.

## APPENDIX 1

### Workload Assignment Procedures and Criteria

#### Criteria

1. Track D is the typical/regular workload assignment for tenure track HS faculty, and Track A is the typical/regular workload assignment for lecturers/instructors. When a faculty request a different workload assignment, the Department Chair, in consultation with the Dean, will determine the appropriateness of the requested workload assignment.
2. The determination will be based upon the relationship between the requested assignment and the college's mission and goals, the needs, the resources, the professional development, the faculty member's past performance, and the proposed action plan of the faculty. The expected outcome (i.e., minimum requirement) for the requested workload assignment will be discussed and agreed upon by the department chair, the Dean, and the faculty and it will be based upon the actual workload for a regular 9-month annual contract.

#### Procedures

1. Every third year, each faculty member will be required to submit an updated Faculty Workload Assignment Application (number of courses within the track range) that will last for a period of three years. This application must be made by November 1 of the year preceding the Fall semester, in which the new workload assignment is to begin. If the faculty does not submit a new Faculty Workload Assignment Application, their previous year's assignment will carry forward. Faculty who have changed their workload assignment in the midst of a three-year assignment cycle (as provided for in item 4 below) will commence their cycle at the next track assignment submission date.
2. After a review of the application, the Chair, in consultation with the Dean, will make the final decision on the track assignment. The Chair will notify the faculty member prior to finalizing the faculty member's assignment. If a faculty member is assigned to a track other than the track for which application was made, upon receiving that faculty member's written request, the Chair will have a meeting with the faculty member regarding the approved assignment.
3. The department chair, in consultation with the Dean, and the faculty member, will decide on the distribution of courses between the fall and spring semesters. For example, a faculty member assigned to track F (3 courses per year) could teach a 1-2 load or a 2-1 load. In making this allocation, the Chair will balance the faculty member's research and teaching goals with department teaching needs and objectives.
4. A faculty member may request reassignment to a different workload track during the course of a three-year assignment period. This request can be made by submitting a new Faculty Workload Assignment Application to the Chair by November 1 of the year preceding the Fall semester in which the proposed new workload assignment would begin. The process for reviewing and responding to the application will be the same as the process described in item 2 above. The Dean must approve all changes in workload assignments.
5. Faculty may file a grievance against workload assignments according to the most current UCF-UFF CBA.

**APPENDIX 2**

**An Example of How a Track D (50% teaching, 40% research, and 10% services) Professor Uses the Rating System to Attain a Satisfactory Rating in Teaching, an Outstanding Rating in Research, and an Above Satisfactory Rating in Services, Respectively.**

For illustration purposes, the professor’s points earned are included under the rightmost column named Points Earned. Based on the rating points earned from the three areas below and the weights from Table 1 and Table 3 for Track D, this faculty member will have an overall rating of Satisfactory because  $3.2 \cdot .4 + 2.4 \cdot .5 + 2.8 \cdot .1 = 2.76$ .

The following example shows how such a faculty can earn a satisfactory rating in Teaching (Points Earned  $\geq 2.4$ )

<b>Table 2: Teaching Standards</b>		
<b>Teaching Standards</b>	<b>Base Points</b>	<b>Points Earned</b>
Annual Average of Student Perceptions of Instruction (SPI) Evaluations The overall effectiveness of the instructor score must be used for each class when calculating the overall SPI score.		
4.00-5.00	1.65	
3.75-3.99	1.30	
3.25-3.74	1.00	1
2.75-3.24	0.65	
Chair of thesis/dissertation committee per student (max 1.0 points per year)	0.50	
Member of thesis/dissertation committee per student (max .60 points per year)	0.30	
Chair of undergraduate honors thesis per student (max .60 points per year)	0.30	
Member of undergraduate honors thesis per student (max .30 points per year)	0.15	
New course preparation (per class; never taught before)	0.30	
Course supervisor/mentor/leader (mentoring new instructor, etc.; per course max .60 points per year)	0.15	
Large class size (graduate - per class) 25+ students	0.15	.15
Large class size (undergraduate - per class) 75+ students	0.15	.30
Coordination of College event (i.e., Conference, Career Fair)	0.30	
Peer observation of teaching (giving/receiving formal written feedback) (max 0.10 points per year)	0.05	
Efforts leading to the development of a degree program/certificate program (with written evidence)	0.30	
University recognized class designation with objective evidence (per class) (max 0.50 points per year)	0.10	
Clear evidence of updates to courses, including syllabi and content (per class) (max .60 points per year)	0.15	.45
Multiple types (at least 4) of learning assessments used per class (max .60 points per year)	0.15	.15
Employment of different teaching methodologies across per class (max .60 points per year)	0.15	.15

Student Mentoring (Works with at least 1 RAMP, LEAD Scholar, or Honor student) (per student)	0.15	
Department/College approved independent study (per student up to 2 students)	0.15	
Active participation/presentation at a teaching and learning conference/workshop (per event)	0.15	.15
Special teaching and curriculum development assignments outside the Rosen College	0.30	
Teaching Award (Current academic year only)		
External Teaching award from International Council on Hotel, Restaurant, and Institutional Education (ICHRIE) or other respected institutions	1.00	
University Teaching Award	1.00	
College or Departmental Teaching Award	0.65	
Student Association Teaching Award	0.30	
<b>Total Points allowable in this section (Teaching)</b>	<b>4.00</b>	<b>2.4</b>

The following example shows how such a faculty can earn an outstanding rating in Research (Points Earned  $\geq 3.2$ )

<b>Table 4: Research and Other Scholarly Activity Standards</b>		
	<b>Base Points</b>	<b>Points Earned</b>
<b>SECTION I (past 3 academic years; based upon TLH list in SCOPUS and H&amp;T Management list in ShanghaiRanking; each article can only be counted once)</b>		
Accepted and/or published refereed journal article in ShanghaiRanking's journal list	1.50	1.5
Accepted and/or published refereed journal article in SCOPUS journal list (Tier 1)	1.00	
Accepted and/or published refereed journal article in SCOPUS journal list (Tier 2)	0.75	
Accepted and/or published refereed journal article (per article)	0.50	.5
Author/co-author of a published scholarly book	1.00	
Author of a published scholarly book chapter or case study	0.50	
Principal Investigator/Co-Investigator of external grant/contract funded (per grant, per year)		
Below \$10,000	1.00	
\$10,001 to \$25,000	1.25	
\$25,001 to \$50,000	1.50	
\$50,001 and above	2.00	
(Contributors get 50% of the points listed above)		
<b>SECTION II (past academic year)</b>		
Principal Investigator/Co-Investigator external grant/contract submitted	0.15	.15
Principal Investigator/Co-Investigator internal UCF or college grant funded (per grant)	0.30	.30
Refereed paper presentation (per presentation)	0.15	.15
Refereed poster presentation (per presentation)	0.10	.10
Research awards (current year only; per award)		
Best paper/outstanding paper award from a journal (per paper)	0.65	

Best paper/outstanding paper award from a conference (per paper)	0.35	
University research award (per award)	1.00	
College or Departmental research award (per award)	0.65	
External research award (Lifetime research award, etc.) (per award)	1.00	
Scholarly work cited by other scholars during the evaluation period (per citation)	0.03	.4
Industry publication such as a report, an interview, newspaper, and magazine article	0.10	.1
Non-funded Community Research Project (per project)	0.15	
<b>Total points allowable in this section (Research - Sections I and II)</b>	<b>4.00</b>	<b>3.2</b>

The following example shows how such a faculty can earn an above satisfactory rating in Services (Points Earned  $\geq 2.8$ )

<b>Table 5: Service Standards (active participation during the year)</b>		
	<b>Base Points</b>	<b>Points earned</b>
<b>University and College Service and Awards</b> (per committee, organization, award, or event)		
University Committee Leadership (i.e., P&T committee chair)	1.30	
University Committee Member	0.65	.65
College Committee Leadership	1.00	
College Committee Member	0.50	
Department Committee Leadership	0.65	.65
Department Committee Member	0.30	.3
Voluntary university/college service activities/events - (student events and gala dinners)	0.30	
Graduation ceremony (per event)	0.10	.1
Faculty advising of student organization (per organization)	0.30	
<b>Industry and Community Service and Awards</b> (per committee, organization, activity, or event)		
Academic, Industry, or Community Association/Organization Leadership/Keynote speech	0.65	
Academic, Industry, or Community Association/Organization Member/Panel/Advisory Board	0.30	
Active participation in an industry/community event	0.65	.65
Industry/Community Service/Scholarship Awards	0.65	
Industry print or electronic media report, newspaper/magazine article, blog (per each report/article) (max .60 pts. per year)	0.15	.15
<b>Service to the Academic Profession</b> (per committee, organization, activity, or event)		
Editor of a book of academic papers/conference proceedings	0.65	
Editor of an academic journal (per issue – maximum 2 points)	0.65	
Guest Editor/Associate Editor of a Special Issue for an academic journal (per issue)	0.65	
Editorial Board Member or Associate Editor of an academic journal	0.30	

(per journal – maximum .60 points)		
Ad-hoc reviewer for an academic journal (per journal – maximum .60 points)	0.15	.3
Chair/Co-Chair of national/international research/academic/industry conference	0.65	
Conference Committee Member (per conference – maximum .30 point)	0.15	
Reviewer for a Conference (per conference – maximum .30 point)	0.15	
<i>Note: Committees must be active and meet at least once each semester, business minutes required</i>		
<b>Total points allowable in this section (Service)</b>	<b>4.00</b>	<b>2.8</b>