

**University of Central Florida**  
**College of Undergraduate Studies**  
**Annual Evaluation Standards & Procedures (AESP)**  
*Faculty Instructional Specialist*

**INTRODUCTION**

The purpose of this document is to provide standards and to outline the procedures regarding annual evaluations for the Instructional Specialist with the Division of Student Learning and Academic Success. The annual performance evaluation shall be based upon the professional performance of assigned duties and shall carefully consider the nature of the assignments and quality of the performance.

The evaluation period shall be the academic year, beginning August 8, and shall include the preceding summer, as appropriate.

**CRITERIA**

Faculty are evaluated on the following criteria:

- A. Instructional Activities
- B. Research & Creative Activities
- C. Service
- D. Other Assigned Duties

**STANDARDS**

The standards for each criterion are further detailed in this document and will be reflected in each faculty's unique Annual Assignment (AA).

**RATINGS**

The faculty is given one of the following numerical ratings for each criterion:

- 0 = (Unsatisfactory): Indicates below satisfactory for **two or more** consecutive evaluations or failure to comply with written instructions for improvement from the Evaluator.
- 1 = C (Conditional): Indicates below satisfactory for **one** evaluation, or failure to comply with written instructions for improvement following below satisfactory performance from the Evaluator.
- 2 = S (Satisfactory): Indicates performance that reflects responsibility appropriate to annual assignment.
- 3 = AS (Above Satisfactory): Indicates performance that is above expectation for the assignment.
- 4 = O (Outstanding): Outstanding is reserved for exceptional performance. It indicates excellence in the profession and adherence to the highest standards.

**Overall Rating:**

For a typical assignment percentage, the overall rating is based on the sum of ratings in the criteria, weighted according to the faculty's percentages in the Annual Assignment. 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)

*Example: For a faculty member with 85% allotted Instructional Activities and an Above Satisfactory rating in this area, 10% allotted to Research and Creative Activities and a Satisfactory rating in this area, and 5% allotted to Service and an Above Satisfactory rating in that area, the overall rating would be:*

*Instructional Activities: 3 (AS) X .85 = 2.55*

*Research and Creative Activities: 2 (S) X .10 = .20*

*Service: 3 (AS) X .05 = .15*

**Overall Rating: 2.55 + .20 + .15 = 2.9 (Above Satisfactory)**

## II. PROCEDURES

Annual evaluation of faculty members is conducted by the Evaluator, who draws upon faculty members' annual reports and renders assessments for each of the basic categories of Teaching, Research, Service/Professional development and Other Assigned Duties. From these assessments, an overall evaluation is derived. The standards are further detailed below and will be reflected in each instructional specialist's unique Annual Assignment and Position Description.

The following procedure will be employed for the administration of faculty evaluations:

- A. **Faculty Annual Report (FAR) Submission Timeline** - The faculty member prepares the Faculty Annual Report (FAR) according to the categories designated on the report form. The form will be completed according to the most current UCF UFF Collective Bargaining Agreement (CBA) timeline.
- B. **FAR Reviewed by Unit Evaluator** - The faculty member submits the FAR, including required addenda, to the Evaluator. In accordance with the CBA, the faculty member can provide material in evidence of teaching quality in cases where the faculty member wishes to highlight extraordinary or unusual efforts, and this will be taken into account in the evaluation. The Evaluator can request additional evidence for any item being considered in an evaluation.

**Evaluation Review and Discussion** - Based on the FAR and discussion with the faculty member, the Evaluator determines an evaluation in accordance with this AESP document for each faculty member in each relevant category as well as calculating an overall evaluation. Evaluation will be conducted following the timeline in the current CBA.

- C. **Disagreement of Assessment and Re-Evaluation Request** - If the faculty member believes the evaluation does not agree with the procedures below or is otherwise not in compliance, the grievance process outlined in the current CBA should be followed.

### III. CRITERIA

Instructional Specialists, hereafter referred to as “faculty member,” are evaluated on the following criteria:

- A. Instructional Activities
- B. Research & Creative Activities
- C. Service
- D. Other Assigned Duties

Due to the variety of activities/duties performed by faculty members from different units and within units, assignment percentages may vary. In general, Instructional Activities are generally assigned at approximately 50% or higher, Research & Creative Activities 0%-10%, Services 5%-10%, and Other Assigned Duties may be assigned up to about 35%. Evaluators will only consider criteria listed in the faculty member’s percent assigned duties. If no percentage assignment is given, the faculty member will not be evaluated in that category.

### IV. STANDARDS AND RATINGS

The Evaluator of each unit will evaluate the performance of each faculty member annually and assign a rating of Outstanding, Above Satisfactory, Satisfactory, Conditional, or Unsatisfactory.

- **Outstanding** is reserved for exceptional performance for the assignment. It indicates excellence in the profession and adherence to the highest standards of the university and the profession. In order to receive an evaluation of “outstanding,” the faculty member must have at least a “satisfactory” in all categories where a faculty member has an FTE of a 0.05 or higher.
- **Above Satisfactory** indicates performance above expectation for the assignment.
- **Satisfactory** indicates performance that is at expectation for the assignment.
- **Conditional** indicates substandard performance for the assignment.
- **Unsatisfactory** indicates substandard performance for the assignment for a second evaluation period in a row, or extreme substandard performance in a single evaluation period.

#### A. First Criterion: Instructional Activities

Instructional activities may include:

- Direct delivery activities (e.g., lectures, workshops, and seminars) as well as activities that support instruction such as class preparation, evaluation of student work, library faculty instruction, supervision of clinical practicums, and laboratory instruction.

- Work related to thesis and dissertation responsibilities, directed individual (i.e. independent) studies, experiential learning and intern/field placement & supervision are also included. Other duties may include graduate student teaching & research supervision, mentoring graduate teaching assistants, off-campus instruction, and development/improvement/revision of materials or teaching methods. Program planning, development, and evaluation and academic student advising may count as Instructional Activities (I), Service (III), or Other Assigned Duties (IV), but may not be counted in more than one section.

### Unsatisfactory

Failure to meet the minimum conditions for **Satisfactory** performance for two or more consecutive evaluations or in relation to written instructions for improvement from the Evaluator.

### Conditional

Failure to meet the minimum conditions for **Satisfactory** performance, resulting in written instructions for improvement from the Evaluator.

### Satisfactory

The faculty member must fulfill *seven (7)* out of the following criteria to receive a rating of Satisfactory:

1. Meet learners on a regular basis as scheduled.
2. Schedule and maintain regular office hours or scheduled meeting time availability for learners.
3. Provide clear and detailed course syllabi or planning documents (e.g., learning outcomes, presentations) for learners.
4. Manage learner experience (i.e., Webcourse updating, handouts, attendance, questions, etc.).
5. Teach, provide feedback, and assess learner efforts in accordance with best practices.
6. Submit evaluations, final grades, and follow-up materials to learners in a timely manner.
7. Train and supervise any assigned student or teaching assistants.
8. Advise learners in all areas relevant to high-impact experiences and academic programming.
9. Maintain confidentiality of students as directed by FERPA and other applicable policies.
10. Handle exceptions appropriately and resolve issues in a timely manner.
11. Interact appropriately with learners.
12. Promote appropriate internal and external programming to students.

## Above Satisfactory

The faculty member must satisfy the above **Satisfactory** criteria (which means 7 out of the 12 items listed) and *three (3)* of the following standards to receive a rating of **Above Satisfactory**.

1. Participate in at least 1 teaching or professional development workshop per year (Faculty Center for Teaching and Learning (FCTL), Course Innovation Project (CIP), etc.)
2. Participate collaboratively to improve instruction for the unit.
3. Receive a positive peer or external evaluation of instructional quality (e.g. Evaluations of workshops, FCTL observation, training programs, etc.)
4. Show evidence of positive learning gains from learners.
5. Show documented positive impact on learning by implementing new or innovatively enhanced instructional approaches.
6. Build new or cultivate existing partnerships to enhance student learning.
7. Present a workshop or seminar on a pedagogical topic internally or externally in addition to regular instructional assignment.
8. Contribute to the development of a new course or instructional workshop (must document involvement on at least 50% of the project)
9. Apply, participate in, or provide support to applying to grant-funding for developing instructional programs or materials (e.g. FCTL, Quality Enhancement Program (QEP))
10. Receive grant-funding for developing instructional programs or materials (e.g. FCTL, QEP)
11. Participate in FCTL Summer or Winter Conference
12. Participate in external training or workshops to improve instruction.
13. Contribute to the development of high-impact programs or grant applications for an on-campus or external partner (documented efforts toward sustained progress)
14. Receive excellent or outstanding ratings from at least 70% of learners during the evaluation period.
15. Receive a majority of positive evaluation comments by learners on surveys or receive more than one personal email of thanks from a learner.
16. Perform some other noteworthy teaching activity that is not included in the above items. (Faculty must submit documentation of such instructional activity.)

## Outstanding

The faculty member must satisfy the **Above Satisfactory** criteria plus one of the above items that requires a significant level of commitment, as documented in the faculty member assignment or as agreed by faculty member and Evaluator (for example, extensive time working on an instructional grant, sustained significant effort in building instructional partnerships, documented involvement with a project that has strategic impact on the UCF community and beyond). The faculty member will provide supporting documentation of activities and efforts to showcase the achievement.

NOTE: Should a faculty member receive an award from the division, university, or professional community that recognizes individual achievement, that alone shall be sufficient to satisfy the

requirements of the Outstanding criteria provided **Satisfactory** criteria are also met. If the award is highly competitive and prestigious (for example, national award), the faculty member is encouraged to document this in other promotion or awards that may be available for the faculty member.

## B. Second Criterion: Research and Creative Activities

Research and Creative Activities include, but are not limited to:

- conduct research and academic scholarship, develop creative works, prepare articles or books for publication.
- perform or exhibit works, and present at professional meetings or conferences essential to remaining current in one's field.
- write grant and/or contract proposals.

*Please distinguish between percent of time assigned to contract and grant (C&G) activities and other assigned research and creative activities (i.e., activities supported by Educational and General, E&G, funds).*

NOTE: Research and publishing are often not required for this position. Research, publishing, and obtaining grant funding are encouraged. Judgments of research productivity will be made in light of the portion of faculty members' assignments that are assigned to research. The faculty member and Evaluator may agree on a special project that is not explicitly covered in the criteria below. In that situation, the project could be considered in the evaluation process if the standards for satisfactory performance are agreed upon in advance.

The faculty member and Evaluator may agree on a special or multiyear project that is not explicitly covered in the criteria below. In that situation, the project could be considered in the evaluation process if the standards for satisfactory performance are agreed upon in advance.

### Unsatisfactory

Failure to meet the minimum conditions for **Satisfactory** performance for a second consecutive evaluation period without improvement over the prior **Conditional** evaluation, or extreme substandard performance in the current evaluation period.

### Conditional

Failure to meet the minimum conditions for **Satisfactory** performance, resulting in written instructions for improvement from the Evaluator.

## Satisfactory

**Satisfactory** performance in the research category entails that the faculty member will keep current in the field. This may be documented through:

1. Maintaining a reading list, listserv or professional affiliations
- Or
2. Information sharing or discussion with the Evaluator or UCF peers about the current state of the field.

## Above Satisfactory

Faculty may obtain an **Above Satisfactory** rating by documenting any *one (1)* of the following activities in addition to the satisfactory criteria:

1. Attendance at conferences or professional development opportunities.
2. Information sharing or discussion about the current state of the field with colleagues outside UCF.
3. Submit a proposal for an external conference presentation or workshop.
4. Submit a proposal for an internal or external research grant.
5. Demonstrate of appropriate progress on a book-length manuscript or article on a significant research project.
6. Present a peer-reviewed paper on research in the field at a conference.
7. Present an invited or keynote address at a conference.
8. Receive at least a revise-resubmit response from the submission of a new article, book chapter, or related project to a peer-reviewed journal or book.
9. Publish a book chapter or journal article.
10. Awarded an internal or external grant for research.
11. Continue administration and execution of the research aspects of a multi-year grant or internal research project.
12. Contribute to a study that supports the understanding of student learning or student success.
13. Contribute and/or supports a grant project or accreditation process.
14. Develop or contribute to institutional effectiveness plan or implementation.

## Outstanding

The faculty member must satisfy the **Above Satisfactory** criteria plus one of the above items that requires a significant level of commitment, as documented in the faculty member assignment or as agreed by faculty member and Evaluator. The faculty member will provide supporting documentation of activities and efforts to showcase the achievement.

NOTE: Should a faculty member receive an award from the division, university, or professional community that recognizes individual achievement, or publish a peer-reviewed book or article, awarded (or administering) a multi-year grant or large internal project, submit a proposal for a

large external grant, that alone shall be sufficient to satisfy the requirements of the Outstanding criteria with appropriate documentation, provided **Satisfactory** criteria are also met. It will not be necessary to document achievement of the **Above Satisfactory** criteria.

If the award is highly competitive and prestigious (for example, national award), the faculty member is encouraged to document this in other promotion or awards that may be available for the faculty member.

## C. Third Criterion: Service

Service includes activities entered into with professional, academic, student, and/or community associations. Examples can include:

- contributions to the department, unit, college, university, State, K-12 education, professional associations, community organizations, and governmental boards, agencies, and commissions.
- contributions can be on the local, state, regional, national, and international levels. Effort for university governance activities should also be recorded here.

NOTE: Since some faculty Instructional Specialist positions are intricately related to community building, service efforts and curriculum efforts are often blurred. Therefore, this parameter is not stated specifically as a requirement for evaluation, but these activities do occur and are considered as activities that contribute to performance that exceeds basic expectations.

### Unsatisfactory

Failure to meet the minimum conditions for **Satisfactory** performance for two or more consecutive evaluations or in relation to written instructions for improvement from the Evaluator.

### Conditional

Failure to meet the minimum conditions for **Satisfactory** performance, which results in written instructions for improvement from the Evaluator.

### Satisfactory

The faculty member must fulfill all of the following criteria to receive a rating of **Satisfactory**:

1. Serve in on- and off-campus committees and provide support where it is needed.
2. Maintain internal or external partnerships and student opportunities.
3. Maintain rapport/productive partnerships.
4. Attend staff and division meetings unless granted permission to be absent.
5. Promote High-Impact Practice (HIP) programs to students and internal or external partners.

## Above Satisfactory

The faculty member must satisfy the above **Satisfactory** criteria and *three (3)* of the following standards to receive a rating of **Above Satisfactory**.

1. Serve on 2 or more committees (e.g. department, college, university, search, professional community,).
2. Chair any committee (may be combined with one of the above.)
3. Serve as a consultant or lead a campus organization, including student clubs.
4. Attend an internal or external-sponsored event outside of normal work hours (e.g., employer site visits, graduation, social, or fundraising events).
5. Give a public presentation or workshop to a local or regional group or organization.
6. Serve as an officer for a local, regional, state, national or international professional organization relating to the field.
7. Evaluate a manuscript for a professional journal or assess a book for publication for a press.
8. Publish a book review in a journal relating to the field.
9. Implement a recruiting or marketing initiative.
10. Provide an interview on a subject related to they/their profession to a local or national media outlet.
11. Host a public lecture by a distinguished scholar in they/their field from outside UCF at UCF.
12. Organize a professional conference, seminar, or workshop for UCF or an external organization.
13. Serve as a designated mentor to students, faculty, or staff.
14. Complete a professional development certificate, program, or course.
15. Provide consulting and additional support to other higher education institutions and industrial partners where needed, and often support these partners in service and fund-raising efforts for good causes.
16. Develop new partnerships and student opportunities.
17. Provide some other noteworthy service that is not included in the above items. Faculty must submit documentation of such service.

## Outstanding

The faculty member must satisfy the **Above Satisfactory** criteria plus one of the above items that requires a significant level of commitment, as documented in the faculty member assignment or as agreed by faculty member and Evaluator. The faculty member will provide supporting documentation of activities and efforts to showcase the achievement.

NOTE: Should a faculty member receive an award from the division, university, or professional community that recognizes individual achievement in service to the University or beyond, that alone shall be sufficient to satisfy the requirements of the Outstanding criteria with appropriate documentation, provided **Satisfactory** criteria are also met. It will not be necessary to document achievement of the **Above Satisfactory** criteria.

If the award is highly competitive and prestigious (for example, national award), the faculty member is encouraged to document this in other promotion or awards that may be available

for the faculty member.

## **D. Fourth Criterion: Other Assigned Duties**

Other Assigned Duties, may include, but are not limited to,

- Attending commencement ceremonies, advising, counseling, supervision of interns, academic administration or other position-specific activities that would be additional to or in place of regular duties (e.g., as described in the faculty member's position description or annual evaluation standards).

Since the nature of these assignments is variable, no attempt is made here to specify the categories used to evaluate these other assigned duties. Nevertheless, these activities will be evaluated as to their quality and in proportion to the total amount of time specified on the annual assignment form. Criteria for evaluating other duties as assigned are created in collaboration between the Evaluator and faculty member. Both parties must agree to the criteria for this section only.