



**School of Kinesiology
and Physical Therapy**

UNIVERSITY OF CENTRAL FLORIDA

Annual Evaluation Standards and Procedures for Instructors and Lecturers

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The purpose of this document is to provide standards and procedures to evaluate the annual performance of instructors and lecturers in the School of Kinesiology and Physical Therapy (SKPT). For further information on the evaluation process, please refer to the UCF/BOT-UFF Collective Bargaining Agreement (CBA).

The criteria for promotion are separate and distinct from the criteria in this Annual Evaluation Standards and Procedures (AESP) document.

General Guidelines

Faculty, as academic and clinical professionals, are expected to contribute to the orderly and effective functioning of the University of Central Florida, the College of Health Professions and Sciences (CHPS) and the SKPT. The specific duties and responsibilities included in written annual assignments from the director of the SKPT will be considered in evaluating faculty. While instructional activities, office hours, and other duties are responsibilities that require performance at a specific time and place, other non-scheduled activities may be appropriately performed in a manner and place determined by the faculty member, with the agreement of the director of the SKPT.

Evaluation Categories

Faculty are evaluated by examining contributions, competence, and scholarship in three main categories: "Instructional Activities," "Research & Creative Activities," and "Service." An additional category of "Other Assigned Duties" may be used to assign responsibilities that do not fit the three main categories. These duties may include activities such as administration, clinical practice, and/or clinical supervision/teaching within a university / university-affiliated practice setting. All relevant areas are evaluated with consideration of the faculty member's rank and assignment.

Procedures

The designated course load is determined by the director in consultation with the program coordinator and faculty member. Assignment of workload is consistent with Article 9 of the CBA and with all applicable university timelines for contract completion. As determined by the director, some faculty may also receive additional release time for responsibilities essential to the functioning of the School (e.g., Program Director, Program Coordinator, Director of Sports Science, etc.). At the close of the spring semester, and per UCF and CHPS policies, each faculty member will submit a faculty annual report and any required supporting documentation. The faculty annual report should accurately delineate the faculty member's accomplishments in each assigned category. The director will use this report, supporting documentation, and other information relevant to the AESP criteria in order to evaluate the faculty member.

Any deviation from the established criteria must be outlined in advance and in writing between the faculty member and school director (and on file with the faculty activity assignment of duties).

Assessment of Performance

The following recommendations are made to establish faculty productivity and effectiveness in their annual evaluations as required under the CBA as well as University regulations. Each faculty member will be given an overall performance assessment based on the ratings in the categories outlined above. Point value will be given based on the rating in each category (see Category and Overall Evaluation Scale table below).

The overall rating will be determined using a weighted formula that accounts for the rating and FTE assigned in each category and with consideration of assigned duties each semester (including summer when applicable). See examples 1 and 2.

An employee is required to receive a minimum rating of satisfactory in each area of assignment (>5% FTE), to receive an overall rating of satisfactory or above.

Category and Overall Evaluation Scale

Evaluation	Category Rating	Overall Rating
Outstanding	4.0	3.5 – 4.0
Above Satisfactory	3.0	3.0 – 3.49
Satisfactory	2.0	2.0 – 2.99
Conditional	1.0	1.0 – 1.99
Unsatisfactory	0	0 - .99

Overall Rating Calculation

Double-Click to open excel. Once open, then input FTE (yellow boxes) for each semester and evaluation rating for each category (Blue Boxes). Overall annual rating will be calculated and placed in the orange box.

	Instructional	Research & Creative	Service	Other/Clinical	FTE		
SUMMER	0.33	0	0	0	0.33		
FALL	0.93	0	0.07	0	1		
SPRING	0.93	0	0.07	0	1		
Sum	2.19	0	0.14	0	2.33		
Weighted FTE	0.94	0	0.06	0	1		
Evaluation	3	0	4	0			
Weighted Rating	2.82	0	0.24	0	3.06	Overall Rating	

How Rating is Calculated in Excel:

1. FTE Total = [\sum Inst. + \sum Res&Cre + \sum Serv. + \sum Other]
2. Weighted FTE = \sum category \div FTE Total
3. Weighted Rating = Category Evaluation X Weighted FTE
4. Overall Rating = Weighted Rating for Inst. + Res. + Serv. + Other

Example above:

1. FTE Total = Inst(0.33 + 0.95 + 0.95) + Serv(0.0 + 0.07 + 0.07)
2. Weighted FTE= Inst (2.19 \div 2.33=0.94); Serv(0.14 \div 2.33=0.06)
3. Weighted Rating: Inst (3 X 0.94 = 2.92); Serv(4 X 0.06 = 0.24);
4. Overall Rating: 2.82 + 0.24 = 3.06

Example 1. Dr. Beau Aucracy (a typical instructor or lecturer with teaching 1 summer course)

	Instructional	Research & Creative	Service	Other	FTE		
SUMMER	0.38	0	0	0	0.38		
FALL	9	0.05	0.05	0	9.1		
SPRING	9	0.05	0.05	0	9.1		
Sum	18.38	0.1	0.1	0	18.58		
Weighted FTE	0.99	0.01	0.01	0.00	1		
Evaluation	4	3	3	0			
Weighted Rating	3.96	0.02	0.02	0.00	3.99	Overall Rating	

Example 2: Dr. Sal Monella (an instructor or lecturer with an administrative assignment of Clinical Education Coordinator), receives the following categorical ratings.

	Instructional	Research & Creative	Service	Other	FTE		
SUMMER	0.75	0	0.05	0.2	1		
FALL	0.75	0	0.05	0.2	1		
SPRING	0.75	0	0.05	0.2	1		
Sum	2.25	0	0.15	0.6	3		
Weighted FTE	0.75	0	0.05	0.2	1		
Evaluation	3	0	3	4			
Weighted Rating	2.25	0	0.15	0.8	3.2	Overall Rating	

INSTRUCTIONAL ACTIVITIES EFFECTIVENESS

Evaluation in the category of "Instructional Activities" will include a review of the instructional activities that the faculty member has contributed to the university, the college, SKPT, and individual professional programs.

Faculty may request special consideration should they experience an extenuating circumstance. Extenuating circumstances may include, but are not limited to: a) first-time course delivery, b) multiple course preparations, c) last-minute course assignment, d) health condition, e) catastrophic occurrences, and/or f) substitution for other faculty.

Evidence

Evidence for “Instructional Activities” effectiveness is outlined below in minimal and universal expectations as well as specific criteria.

Minimum Expectations:

- Faculty will set class/activities for the entire semester as published in the university calendar, including the final examination period, unless the school director has approved a request to cancel a meeting during the final examination period in advance;
- Each course assigned to the faculty member must include and follow a syllabus that adheres to current university guidelines. Each faculty member must also provide an electronic version of the syllabus to the appropriate staff member in the School;
- Faculty will post and attend their required office hours according to current university, college, and school guidelines;
- Faculty will use appropriate instructional materials such as textbooks, readings, assessment tools, and intervention programs;
- Faculty will cover appropriate course topics and reflect current knowledge in course presentations and clinical management in assigned areas;
- Faculty will demonstrate the infusion of evidence-based practices into course materials and clinical experiences where appropriate;
- Faculty will use appropriate instructional techniques and evaluation and reporting formats;
- Faculty will evaluate student performance in a fair, equitable, and timely manner;
- Faculty will demonstrate current knowledge and expertise in assigned areas of teaching;
- Faculty will collaborate to support the implementation of the curriculum;
- Faculty will integrate appropriate technology in course presentation (e. g., online course enhancement); and
- Faculty with clinical teaching/mentorship will comply with state and federal regulations, and use appropriate communication of student performance to academic program administration.

Expectations according to rank and consistent with the time in rank

Instructor/Lecturer	Associate Instructor/Lecturer	Senior Instructor/Lecturer
<ul style="list-style-type: none"> • Serves as chair, member, or mentor for student projects, capstone projects, and/or theses/dissertations. 	<ul style="list-style-type: none"> • Serves as chair, member, or mentor for student projects, capstone projects, and/or theses/dissertations. • Mentors, colleagues, and/or students in their professional role development and/or teaching. 	<ul style="list-style-type: none"> • Serves as chair, member, or mentor for student projects, capstone projects, and/or theses/dissertations. • Mentors colleagues and students in their professional role development and/or teaching. • Provides leadership in curriculum development.

The following schema provides specific criteria for the evaluation of all faculty in the area of “Instructional Activities.”

Rating	Criteria	Instructional Activities, Mentoring, Awards
Outstanding	<p>To achieve an OUTSTANDING evaluation in “Instructional Activities,” faculty must meet all minimum expectations and universal expectations according to rank and must complete at least 5 instructional activities from the list.</p> <p><i>*At least 2, but no more than 3, are required from Category 1.</i></p>	<p>Category 1. Instruction Activity</p> <ul style="list-style-type: none"> • Achieve “Good” to “Excellent” instructor evaluation ratings (SPI’s) from at least 75% of students who completed an evaluation in all of the courses taught annually. • Development of one new course • Make major revisions in an existing course • Leading or Co-Leading the development of a new program or make curricular revisions in an existing program • Contribute to the development of a study abroad or service-learning course • Develop and integrate innovative teaching strategies or technologies that enhance curriculum and/or instruction • Seek feedback on teaching effectiveness (e.g., FCTL or other peer evaluation) that demonstrates excellence • Obtain High Impact Practices course designation by College of Undergraduate Studies (Integrative Experience Courses; Research Intensive Courses; Service Learning). • Obtain Quality and High-Quality designation by CDL for Mix Mode and Online Courses. <p>Category 2. Mentoring</p> <ul style="list-style-type: none"> • Member of a student thesis/capstone committee or dissertation committee (may be counted in successive years for the same student) • Chair a student thesis/capstone committee or dissertation committee (may be counted in successive years for the same student; may be counted more than once for different students in the same year) • Serve on a student project (e.g., FIRE, Lead Scholars, directed independent study, independent research course) • Mentorship of a student project that results in a publication or conference presentation (can be counted when accepted or published/presented, but may not count in more than more annual reporting cycle) • Produce a manual, guide, newsletter article or other materials for faculty members regarding the curriculum or instructional methods • Lead or provide significant contributions towards and extracurricular student activity (e.g., interprofessional education, study abroad) <p>Category 3. Other</p> <ul style="list-style-type: none"> • Produce a textbook related to the faculty member’s area of teaching (Note: publication of an entire textbook will count as two Instructional Activities and cannot be counted again under Research & Creative Activities) • Produce a publication (e.g., journal article, book chapter) related to the faculty member’s area of teaching (Note: if a publication is counted here, it will not count again under Research & Creative Activities) • Received a grant or other funding that advances the teaching mission of the program and/or School • Receive a teaching award from the college, university, or professional organization (e.g., Teaching Incentive Program or Scholarship of Teaching and Learning Award) • Earn a certification in a content area (enhances the ability to teach) • Documented attendance at FCTL OR CDL programming activities. • Serve as a guest speaker for another faculty member’s course to provide expertise/enhance student learning
Above Satisfactory	<p>To achieve an ABOVE SATISFACTORY evaluation in “Instructional Activities” faculty must meet all minimum expectations and universal expectations according to rank and must complete at least 4 instructional activities from the list</p> <p><i>*At least 1 required from Category 1</i></p>	
Satisfactory	<p>To achieve a SATISFACTORY evaluation in “Instructional Activities” faculty must meet all minimum expectations and universal expectations according to rank and must complete at least 3 instructional activities from the list</p> <p><i>*3 from any Category is required</i></p>	
Conditional	<p>An evaluation of CONDITIONAL in “Instructional Activities” will be assigned if s/he fails to achieve satisfactory.</p>	

Unsatisfactory	The faculty member will receive an UNSATISFACTORY rating upon their second consecutive CONDITIONAL rating and/or if poor performance in this area has resulted in discipline or counseling.	

RESEARCH & CREATIVE ACTIVITIES EFFECTIVENESS

Evaluation in the category of "Research & Creative Activities" will include a review of the scholarly activities that the faculty member has contributed to the university, the college, SKPT, and the individual professional programs. (Note: The FTE for Research and Creative Activities must average (across fall and spring) to .05 or greater to be considered in the evaluation process.)

Evidence

Evidence for "Research & Creative Activities" effectiveness is provided through a review of the faculty's annual report. The director will validate the accuracy of the information submitted, but it is the faculty member's responsibility to include all relevant activities.

Notice of acceptance may be reported and credited towards the annual evaluation. However, each item may only be counted once (either when accepted or published/presented, but not both). When possible, papers, book chapters, books, and presentations should be reported using the year they are published/presented with complete citations so that they may be considered and cited in the school annual report for the college and possible publicity.

Submission of a competitive grant may take the place of a publication in a given year.

The following schema provides specific criteria for the evaluation of all faculty in the area of "Research & Creative Activities."

Rating	Criteria	Research and Creative Activities
Outstanding	To achieve an OUTSTANDING evaluation in "Research & Creative Activities," faculty must publish ONE article in a peer-reviewed journal or invited presentation at a state, regional or local level; and complete at least TWO research and creative activities from the list.	<p>Note: Faculty may use an activity more than once (e.g., two peer-reviewed publications)</p> <ul style="list-style-type: none"> • Accepted peer-reviewed or invited presentation/poster at a conference • Manuscript accepted in a peer-reviewed publication (in addition to criteria) • Author textbook chapter • Author textbook (may be counted as two activities if it is a 1st edition original textbook) • Develops ancillary materials for textbooks • Published revision of a textbook (e.g., 2nd edition) • Writes a grant proposal for research or clinical project • Receives grant funding for research or clinical project • Receives awards for research (internal or external) • Authors monograph or editorial • Authors online resources/publications
Above Satisfactory	To achieve an ABOVE SATISFACTORY evaluation in "Research & Creative Activities," faculty must publish ONE article in a peer-reviewed journal or invited presentation at a state, regional or local level; and complete at least ONE research and creative activities from the list.	
Satisfactory	To achieve a SATISFACTORY evaluation in "Research & Creative Activities," faculty must have ONE article in a peer-reviewed journal or presentation at a state, regional or local level if not, then at least TWO research and creative activities from the list.	
Conditional	A faculty member will receive a CONDITIONAL evaluation in "Research & Creative Activities" if s/he fails to achieve satisfactory.	

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Unsatisfactory	<p>The faculty member will receive an UNSATISFACTORY rating upon their second consecutive CONDITIONAL rating and/or if poor performance in this area has resulted in discipline or counseling.</p> <p>Instructor/Lecturer faculty who achieve an UNSATISFACTORY rating will not be eligible to receive a "Research & Creative Activities" FTE assignment for one evaluation period.</p>	
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SERVICE EFFECTIVENESS

Evaluation in the category of "Service" will include a review of the service activities that the faculty member has contributed to the university, the college, SKPT, the profession, and local, state, regional, national, and international communities.

An administrative assignment in the SKPT, college, or university is not viewed as a part of the service responsibility. Such assignments will be evaluated under the category of "Other Assigned Duties."

Evidence

Evidence for "Service" effectiveness is provided through a review of the faculty's annual report. The director will validate the accuracy of the information submitted, but it is the faculty member's responsibility to include all relevant service activities. The faculty member is responsible for including a description of the activity, as well as their role and volume of contribution.

Typically, consultations or other activities for which the faculty member receives payment will not usually be counted toward productivity in this area. Moreover, such activities may require "Possible Conflict of Interest" reporting.

Minimum Expectations:

- Attend program/division and SKPT meetings regularly; Attend any meetings or events (e.g., All College Meeting) as mandated by their program director, director or CHIPS/UCF administration, unless permission is obtained in advance; Be an active member of at least one school, college or university level committee/task; attendance at least one graduation ceremony per year is expected.

Expectations according to rank and consistent with the time in rank

Instructor/Lecturer	Associate Instructor/Lecturer	Senior Instructor/Lecturer
<ul style="list-style-type: none"> • Committee or task participation on at least two of the following levels (program, School, college, university, or professional). 	<ul style="list-style-type: none"> • Committee or task participation on at least two of the following levels (program, School, college, university, or professional). • Committee or task force participation in the faculty member's profession. • Mentors colleagues and students in their professional role development. 	<ul style="list-style-type: none"> • Committee or task participation on at least two of the following levels (program, School, college, university, or professional). • Committee or task force participation in the faculty member's profession. • Mentors colleagues and students in their professional role development.

The following schema provides specific criteria for the evaluation of all faculty in the area of "Service."

Rating	Criteria	Service Activities
Outstanding	To achieve an OUTSTANDING evaluation in the area of "Service," faculty meet all minimum expectations; and readily respond to the service needs of the university, the profession, and the community by engaging in at least THREE service activities on the list.	<p>Note: Faculty may use an activity more than once (e.g., member or chair of two committees)</p> <ul style="list-style-type: none"> • Serve as a member on the program, School, college, or university committee/task force (attendance and active participation) • Chair a committee or task force at the program, school, college and/or university levels • Provide leadership to a university and/or community activity that impacts students, faculty, staff, and/or clients • Participate in external reviews for faculty promotion • Participate on accreditation site visit teams or review boards • Hold a leadership position in a professional organization at the state, regional or national level • Provide professionally related talks or speeches to local, regional, or national/international groups or organizations • Provide presentation(s) and/or service to public schools, healthcare agencies, and or other higher education agencies • Participate in conference planning and presentations • Assume a leadership role in professional and/or community organizations impacting the professions and/or the community • Review abstracts for a conference • Review for a journal • Member of an editorial board • Serves as track/session chair for a conference • Editor of a journal or guest editor of a journal issue • Editor textbook • Reviews grant proposals • Faculty advisor for a UCF registered student organization (RSO)
Above Satisfactory	To achieve an ABOVE SATISFACTORY in the area of "Service," faculty must meet all minimum expectations; and readily respond to the service needs of the university, the profession, and the community by engaging in at least TWO service activities on the list.	
Satisfactory	To achieve a SATISFACTORY in the area of "Service," faculty must meet all minimum expectations; and readily respond to the service needs of the university, the profession, and the community by engaging in at least ONE service activity on the list.	
Conditional	A CONDITIONAL evaluation in the area of "Service" is assigned if s/he fails to achieve satisfactory.	
Unsatisfactory	The faculty member will receive an UNSATISFACTORY rating upon their second consecutive CONDITIONAL rating and/or if poor performance in this area has resulted in discipline or counseling.	

**OTHER ASSIGNED DUTIES
EFFECTIVENESS**

Assignment of "Other Assigned Duties" (e.g., Program Director/Coordinator, Director/Coordinator of Clinical Education, special projects) will be made when the annual assignment is created. The FTE allotted for these duties should commiserate with the time necessary to efficiently and successfully perform the tasks.

The faculty member will be provided with a description of the duties and expectations when the annual assignment is made. In the case of a faculty member whose title includes an administrative role, the duties and expectations are outlined in the position description and were accepted upon hire.

The following schema provides specific criteria for the evaluation of all faculty in the area of "Other Assigned Duties."

Rating	Criteria	Other Assigned Duties Activities
Outstanding	To achieve an evaluation of OUTSTANDING , the faculty member must complete the assigned duties following the standards of the university and accrediting agency (if applicable). The assigned duties are carried out in a manner that requires almost no intervention by the school director and with evidence of excellence.	Examples include: <ul style="list-style-type: none"> • Program Director or Program Coordinator • Director of Clinical Education or Clinical Education Coordinator • Director of Wellness Research Center • Coordination of a continuing education or training event • Coordination of IPE, simulation, or similar academic endeavor • Coordination of diversity, international, or global activity Outreach program examples: <ul style="list-style-type: none"> • Develop a new outreach program in the community • Coordinates or maintains an active involvement in an outreach program throughout the school year. • Integrates program activities with unit objectives/mission • Assesses outcomes • participates in quality improvement Clinical education examples: <ul style="list-style-type: none"> • Maintains affiliation with clinical sites, healthcare organizations, and hospital systems for student placements and ensure their effectiveness as clinical instructors/sites • Develop new affiliations with clinical sites, healthcare organizations, and hospital systems for student placements • Ensure students are meeting benchmarks in their clinical education • Responds to challenges or needs regarding student performance
Above Satisfactory	To achieve an evaluation of ABOVE SATISFACTORY , the faculty member must complete the assigned duties following the standards of the university and accrediting agency (if applicable). The assigned duties are carried out in a manner that requires little intervention by the school director and with evidence of high-quality.	
Satisfactory	To achieve an evaluation of SATISFACTORY , the faculty member must adequately complete the assigned duties following the standards of the university and accrediting agency (if applicable). The assigned duties are carried out in a manner that requires intervention by the school director.	
Conditional	A faculty member who fails to meet the standards of a SATISFACTORY rating and places the program, students, or project at risk will be given a CONDITIONAL rating.	
Unsatisfactory	A faculty member who fails to earn CONDITIONAL or above for two consecutive evaluation periods and/or if poor performance in this area has resulted in discipline or counseling will receive an evaluation of UNSATISFACTORY and may have their responsibilities (e.g., for program direction) removed.	