



## University of Central Florida

### The Lou Frey Institute Annual Evaluation Standards & Procedures

#### **Mission of the Lou Frey Institute**

The mission of the Lou Frey Institute (LFI) is to promote the development of enlightened, responsible, and actively engaged citizens.

This mission is accomplished through several different avenues including, but not limited to, (1) civic education programs that encourage thoughtful debate and discussion about current policy issues; (2) experiential learning programs that encourage the development of civic and political skills; (3) working to help strengthen the civic education capacity of Florida's K-12 education system; and (4) research, policy analysis, and advocacy.

#### ***LFI Evaluation Criteria***

The roles and responsibilities of Institute employees may differ widely. Because the work agenda of the Institute is driven by both internal and external demands, roles and responsibilities may vary within and across evaluation periods due to shifting internal and external priorities. The intent of the Institute's evaluation framework is to provide clarity of expectations while permitting sufficient flexibility to accommodate a dynamic allocation of roles and responsibilities.

The employee and the Director will determine planned activities for the evaluation period collaboratively at the beginning of each evaluation period. For each planned activity, the Director and the employee will establish a relative level of effort, expressed as a percentage of FTE, to be devoted to the activity and indicated on the assignment of duties. This will constitute the employee's Work Plan for the evaluation period. Work Plan activities and Work Plan effort levels may be modified during the evaluation period.

At the conclusion of the evaluation period, the Director will use the Annual Evaluation and Procedures form (AESP), in conjunction with the annual report and assignment of duties, to assign a rating for each of the employee's planned activity.

***Overall evaluation.*** The overall evaluation will be based on the scaled sum of the evaluation in each category for which the faculty member has an assignment of .05 FTE or above. The scaled sum will be calculated by assigning a numerical score of 1-5 to the evaluations in each activity category of Unsatisfactory through Outstanding, respectively and weighted according to assigned FTE.

The scaled sum will be converted to an overall evaluation as follows: < 1.5: Unsatisfactory; 1.5 - 2.49: Conditional; 2.5 - 3.49: Satisfactory; 3.5 - 4.49: Above Satisfactory; 4.5 and higher: Outstanding. Regardless of the numerical score, however, in order for the overall score to be

at least Satisfactory the faculty member cannot have Unsatisfactory or Conditional ratings in any evaluation category in which the assigned effort was at least .05 FTE.

## ***EVALUATION CATEGORIES***

### ***I. LFI PROJECTS AND ACTIVITIES (VARIABLE FTE PER INDIVIDUAL BASED ON ASSIGNMENT)***

This category includes both externally funded projects and projects internal to the Lou Frey Institute. Because activities associated with a project may span multiple years, projects may appear in annual evaluations for more than one year. Credit will be given for projects and activities for the year(s) in which they occur. Projects may include, but are not limited to: (1) curriculum development; (2) professional development workshop planning and facilitation; (3) assessment development; (4) online program development and facilitation; (5) other projects and programs, as described in the Annual Evaluation Standards and Procedures form.

**Unsatisfactory** Failure to meet the criteria for a Satisfactory rating or above for two consecutive evaluation periods shall result in a rating of Unsatisfactory.

**Conditional** ratings will be assigned to personnel who have not met the objectives of the majority of their assigned projects, activities, or proposals, regardless of the success of relevant projects, activities, or proposals as a whole. This rating will also apply to personnel who do not meet the expected minimum level of performance in assigned activities, based on the expected level of involvement described in the assignment of duties, regardless of the success of relevant projects, activities, or proposals as a whole.

**Satisfactory** ratings will be assigned to personnel who have performed their duties in a correct and appropriate manner in all or essentially all projects, activities, or proposals in which they have a role or duties, but have not made contributions that exceed the minimum expectations or requirements, regardless of the success of relevant projects, activities, or proposals as a whole. Minimum expectations or requirements reflect the specific assigned tasks and duties relating to the relevant project activity, or task. This rating will also apply to faculty who meet, but do not exceed, the expected minimum level of performance in assigned activities, based on the expected level of involvement described in the assignment of duties, regardless of the success of relevant projects, activities, or proposals as a whole.

**Above Satisfactory** ratings will be assigned to personnel who have performed their duties in a correct and appropriate manner in all projects, activities, or proposals in which they have a role or duties and have performed exemplary work in at least one of their activities, regardless of the success of relevant projects, activities, or proposals as a whole. Exemplary work includes, but is not limited to, adding value to the project by making a contribution above and beyond what is called for in the project description or statement of work that significantly enhances the quality of the final project work. This may include, but is not limited to, assisting colleagues beyond the scope of assigned work, collaborating beyond expectations with external partners, or adding additional value beyond minimum expectations. This rating will also apply to faculty who exceed the expected minimum level of performance in assigned activities, based on the expected level of involvement described in the assignment of duties regardless of the success of relevant projects, activities, or proposals as a whole.

**Outstanding** ratings will be assigned to personnel who have made outstanding, measurable, and recognized contributions to multiple proposals, projects or activities, regardless of the success of relevant projects, activities, or proposals as a whole. Outstanding ratings may also be assigned for personnel who have added value in executing one or more of the projects and activities described in the AESPF, regardless of the success of relevant projects, activities, or proposals as a whole. Personnel seeking an outstanding rating in this category should have met one or more of the following criteria: (1) broadening the scope of a project's deliverables to include new components that significantly enhance the value of the final product and/or significantly enhance the visibility of LFI; (2) successfully dealing with unanticipated challenges in executing project work; or (3) broadening the scope of a project to include new components and successfully completing those components. This rating will also apply to personnel who greatly exceed the expected minimum level of performance in assigned activities, based on the expected level of involvement described in the assignment of duties, regardless of the success of relevant projects, activities, or proposals as a whole.

## **II. *INFORMATION DISSEMINATION (VARIABLE FTE PER INDIVIDUAL BASED ON ASSIGNMENT)***

Information dissemination may take many forms, all of which may contribute to LFI's goals. Since much of LFI's work is focused on curriculum development, research, writing, the production of educational materials, conference proposals, and related writing and communication tasks are to be considered under this category. Examples include, but are not limited to, peer-reviewed publications and a variety of other forms of communication, such as instruction in professional development workshops, sharing of curriculum and assessment work with stakeholders, conference proposals and presentations, materials, and presentations, journal articles, books, book chapters, conference proceedings, email communication (internal and external), reports and original content published on publicly accessible websites and social media. The determination of ratings in this category is dependent on the Anticipated Responsibilities and Activities of Part A in the relevant section of the Annual Evaluation Standards and Procedures form. The employee and the Director should agree to the appropriate measure of Satisfactory, Above Satisfactory, and Outstanding ratings. This measure may differ across employees based on job assignment, duties, and goals, and should reflect expectations of roles and responsibilities. Example: Employee One's Anticipated Responsibilities and Activities, as stated in the relevant section of this form, may include a certain number of journal articles or book chapters submitted for review/publication over the course of the year, while Employee Two's may instead focus on a certain number of presentations or professional development workshops over that same time.

**Unsatisfactory** Failure to meet the criteria for a Satisfactory rating or above for two consecutive evaluation periods shall result in a rating of Unsatisfactory.

**Conditional** ratings will be assigned to personnel who have not made any effort, despite prompting from the LFI Director, to create or disseminate LFI-related tools, resources, and/or publications. This may include, but is not limited to, peer-reviewed publications and a variety of other forms of communication, such as instruction in professional development workshops, implementation of curriculum, sharing of assessment work, conference proposals, materials, and presentations, journal articles, books, book chapters, conference proceedings, email communication (internal and external), reports and original content published on publicly accessible websites and social media. or other means and methods of information dissemination. This rating will also apply

to personnel who do not meet the expected level of performance in assigned activities, based on the expected level of involvement described in the assignment of duties.

**Satisfactory** ratings will be assigned to faculty who meet the expected minimum level of performance in assigned activities, based on the expected level of involvement described in the assignment of duties.

**Above Satisfactory** ratings will be assigned to faculty who exceed the expected minimum level of performance in assigned activities, based on the expected level of involvement described in the assignment of duties.

**Outstanding** ratings will be assigned to faculty who have made outstanding, measurable, and recognized contributions beyond the expected minimum level of performance in assigned activities, based on the expected level of involvement described in the assignment of duties.

### **III. *PROFESSIONAL DEVELOPMENT, SERVICE, AND PARTNERSHIPS (VARIABLE FTE PER INDIVIDUAL BASED ON ASSIGNMENT)***

Factors considered for professional development and service include the following four categories: service activity, attendance at professional conferences and meetings, educational development, and partnerships (see below for descriptions).

1. *Service activity* includes active participation in UCF or non-UCF based professional organizations.

2. *Attendance at Professional Conferences and Professional Meetings* includes attendance (virtual or in-person) at professional meetings and conferences related to the employee's professional role in the Institute. The definition of "meetings and conferences" should include state, national, international, or organizational webinars, and state, national, international, or organizational meetings and conferences.

3. *Educational Development* consists of virtual or face to face courses taken as a learner, including college courses, conference sessions, short courses and workshops that contribute to professional growth in the employee's role in the Institute.

4. *Partnerships* involves the development and maintenance of partnerships and collaboration with both UCF and non-UCF organizations. Activities intended to foster and support partnerships that make a tangible contribution to LFI's mission will be considered under this category.

**Unsatisfactory** Failure to meet the criteria for a Satisfactory rating or above for two consecutive evaluation periods shall result in a rating of Unsatisfactory.

**Conditional** ratings will be assigned to personnel who, during the reporting period, have no service activities, no attendance at professional conferences and professional meetings, no educational development, and have made no effort to contribute to or develop partnerships. Performance needs to improve.

**Satisfactory** ratings will be assigned to faculty who, during the reporting period, have met

the expected minimum level of performance in assigned activities, based on the expected level of involvement described in the assignment of duties. At a minimum, this should include completing at least one activity within one category as described above.

**Above Satisfactory** ratings will be assigned to faculty who, during the reporting period, exceed the expected minimum level of performance in assigned activities, based on the expected level of involvement described in the Annual Evaluation Standards and Procedures Form. Above satisfactory ratings will apply when personnel: (1) complete one additional activity within one category or, (2) complete one activity in one additional category, that was not previously described in the assignment of duties.

**Outstanding** ratings will be assigned to faculty who, during the reporting period, exceed the expected minimum level of performance in assigned activities, based on the expected level of involvement described in the Annual Evaluation Standards and Procedures Form. Outstanding ratings will apply when personnel: (1) complete two or more activities within one category or, (2) complete one activity in two additional categories that was not previously described in the assignment of duties.

For all of the evaluation categories described above, there may be instances of significant and valuable contributions to the mission of LFI that are not captured by the specific activities and products listed above. Employees shall provide details of such contributions in their annual reports with a suggestion for which category they belong in, and the evaluator shall take these contributions into account when determining an evaluation for that category.

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

#### ***IV: INSTRUCTIONAL ACTIVITIES AND EXPECTATIONS (VARIABLE FTE PER INDIVIDUAL BASED ON ASSIGNMENT, BUT REFLECTIVE OF SPSIA POLICY)***

***Traditionally, LFI faculty are non-teaching, and the AESP is designed with this in mind. However, there may be times when LFI personnel are tasked with teaching responsibilities. As such, this section is provided to support evaluation.*** This section should be weighted according to instructional FTE established by School of Politics, Security, and International Affairs policy. To help with this component of the evaluation, the faculty member can provide a variety of evidence demonstrating their effectiveness in promoting student learning. Below is a list of some specific types of evidence that could be useful. Faculty are not required to submit all of these materials, and they may submit other materials that would be useful in the supervisor's evaluation. The materials should be carefully curated to focus only on aspects that the faculty member believes are relevant. The supervisor may also require a faculty member to submit specific materials.

1. **Syllabi.**
2. **Course Materials:** Examples of textbooks, readings, and other resources used.
3. **Evidence of varied and appropriate teaching methods:** lecture notes, multimedia presentations, technology integration, active learning activities.
4. **Grade Distributions:** Data on grade distributions, highlighting improvements or trends over time.
5. **Pre- and Post-Test Results:** Evidence of learning gains through comparative analysis of pre-

course and post-course assessments.

6. **Student Evaluations:** Summary of student evaluation scores and comments, with emphasis on teaching effectiveness and learning experience.
7. **Engagement Metrics:** Data on student participation in class activities, such as attendance records, discussion board activity, or engagement in group work.
8. **Professional Development Activities:** List of workshops, seminars, or courses attended focused on teaching and learning with certificates of completion or evidence of participation. Documentation of changes made to teaching practices based on student feedback, self-reflection or professional development, such as revised syllabi, new teaching methods, or updated course materials.
9. **Self-reflection statement that explains the impact of the teaching activities.**

## EVALUATION CRITERIA

Section 1: The following **basic expectations** are required for all faculty and need to be met to receive a rating above conditional. In cases when a faculty member is not able to meet these expectations for a short period of time due to circumstances beyond their control, the faculty member should inform the supervisor as soon as practicable. (For example, a faculty member is unable to log into Webcourses due to a technical issue that is expected to take three days to fix. They should inform the supervisor of the situation right away.)

1. Convenes all classes with regularly scheduled class meetings (such as face-to-face, mixed mode, and synchronous online) as scheduled (unless there is prior approval) and teaches all classes in the modality they were scheduled.
2. Maintains a regular online presence, being present online at least once every day (email and within the learning management system) when teaching online courses.
3. Holds all scheduled office hours in the appropriate modality and location and provides opportunities for student appointments outside of office hours pursuant to unit, college, and university policy.
4. Replies to student inquiries within 2 business days (except when students have been notified through class announcements).
5. Submits book orders and syllabi on time as required by university and unit policy.
6. Complies with state, university, and unit policies and deadlines pertaining to teaching, including syllabus policies and final grade submission deadlines.
7. Maintains accurate and up-to-date grades on Webcourses which reflect the grade the student is receiving in the class and makes those grades visible and available to students.
8. Holds final examinations in compliance with university regulations and policies.
9. Appropriately supervises and evaluates any TAs and other assistants (graduate or undergraduate) assigned to help with instruction.

10. Upholds a high level of professionalism when communicating with students in and out of the classroom.

**Section 2:** Each of the evaluation criteria in the next section will be rated as follows: 1 – Unsatisfactory, 2 - Needs Improvement, 3 – Satisfactory, 4 – Above satisfactory, 5 – Outstanding, N/A -if a question is not applicable (questions rated N/A will not be considered when computing overall evaluation of teaching).

**Classroom teaching (all courses taught during the evaluation period will be assessed including summer and overload courses)**

1. All courses had clear and measurable learning objectives.
2. The course content was aligned with the stated learning objectives.
3. Assessments (tests, quizzes, assignments) effectively measured student learning outcomes as evidenced by score distributions and grading rubrics.
4. Course materials and assignments reflect the current state of the subjects covered.
5. Course materials are well organized.
6. The instructor provided timely (usually within one week of submission) and constructive feedback that supported student learning.
7. Based on collected data (e.g., grades, pre- and post-tests, standardized assessments), students demonstrated significant progress towards reaching the learning objectives of the class.
8. Student evaluations indicated high satisfaction with the instructor's teaching and the learning experience.

**The following two criteria are optional and apply only if appropriate:**

9. Other Contributions (This category may include designing new classes, developing a new program that contributes to student success, providing input on SPSIA course re-designs, etc.):
10. Successfully remedied areas of concern specifically pointed out in the previous year's evaluation.

**Overall Evaluation of Teaching:**

To receive a rating of **satisfactory** a faculty member needs to meet all basic expectations in Section 1 and achieve a score of satisfactory or above on each of items on the criteria in Section 2.

To receive a rating of **above satisfactory** a faculty member needs to meet the criteria for satisfactory and achieve an average of at least 4 on the criteria in Section 2.

To receive a rating of **outstanding**, a faculty member needs to meet the criteria for satisfactory and achieve an of at least 4.6 on the criteria in Section 2.

**The score in this section will be considered in addition to categories I-III only when an appropriate FTE is assigned in this area.**