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ANNUAL EVALUATION STANDARDS AND PROCEDURES (AESP)

GUIDANCE FOR ANNUAL REPORT PREPARATION



DEPARTMENT OF MANAGEMENT
COLLEGE OF BUSINESS ADMINISTRATION
UNIVERSITY OF CENTRAL FLORIDA

- Updated and approved by Department Chair (Rebecca Bennett) & AESP faculty committee in Spring 2024 (Committee members: Dana Joseph, Lynn Becker, John Bush, Jim Combs)
- Revised by Dean Paul Jarley September 20, 2024
- Revised by department AESP committee February 10, 2024
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- Request by Dean to Provost to implement This Draft made on 2/20/25

INTRODUCTION

The Management Department Annual Evaluation Standards and Procedures (AESP) is a work assignment and evaluation system designed for performance appraisal of faculty within the Department of Management. The plan has multiple tracks differentiated by faculty classification, course load, and assignment of effort to teaching, research, professional development, and service activities. The objectives of the AESP are to:

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

PART I. WORKLOAD TRACKS

Evaluation Weights by Assignment Track

Each year, the Department Chair will assess each faculty member's professional performance based on teaching, service, research, and professional development activities (Track A only), 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 assignment (i.e., 3-credit courses or equivalent within a regular 9-month contract).

Table 1: Evaluation Weights by Workload Assignment

Professional Activity	Track A 8 Courses	Track C 6 Courses	Track E 4 Courses	Track F 3 Courses
Teaching	80%	60%	40%	30%
Research	10%*	30%	50%	60%
Service	10%	10%	10%	10%

*Faculty in the Instructor classification (Track A) will have no research assignment but instead will be provided an evaluation for professional development. These faculty members will have Teaching 80%, research 0%, Service 10%, other (professional development) 10%.

Tenured and tenure-track faculty will typically be assigned to Track E in Table 1.

Beginning Fall 2026, associate professors who have been tenured for at least five years and wish to continue on a four-course load based on research expectations must initiate a Cumulative Performance Evaluation during their sixth year post-tenure and achieve an overall rating of *at expectations* or better from the department faculty, department chair, and dean to maintain this teaching load for the subsequent year. Such an endorsement means that the evaluators believe the candidate is highly likely to achieve the rank of Full Professor in the next three years. Faculty who fall short of this endorsement and have been an associate professor for 8 years or more will be immediately placed on six-course load. Faculty who receive this endorsement but have not applied for promotion by the end of their eighth year post-tenure will be immediately placed on a six-course load.

Such faculty can petition for a return to a four-course load through a subsequent CPE after two years in the higher teaching load track. These teaching loads do not include the impact of any course releases provided for administrative assignments or unusually time-consuming service assignments.

These teaching loads do not include the impact of any course releases provided for administrative assignments or unusually time-consuming service assignments.

At the Professor rank, the expectation is that the individual will continue to have a productive research program and will contribute significantly to necessary service roles. To continue on Track E or Track F, Professors must consistently earn an overall evaluation of satisfactory or higher in research. They are also expected to provide service through leadership roles within and beyond the department (i.e., the college, university, and/or the profession).

Although expectations are that most faculty members' time will be allocated in the proportions given above, it is recognized that circumstances may arise which warrant variations in the percentages under each option. The Department chair has the flexibility to make minor adjustments to the weights listed in Tables 1, with the faculty member's consent, when special circumstances warrant making the change. For example, atypical circumstances (such as a special service commitment which is valuable to the Department but is unusually time-consuming) may warrant a temporary course release for a faculty member. Or a professionally qualified instructor who is heavily involved in valuable service activities may warrant a 20% service assignment, rather than the typical 10%. Ultimately, each faculty member's annual performance evaluation will be based upon the actual workload for that evaluation period.

Reduced effort in teaching may also be granted to faculty with contractual research obligations (e.g., \$1.5 million in funding over five years for associate professors and \$3 million in funding over five years for full professors) that are specified at the time of hire.

All course reductions from the prior year require the approval of the Dean.

Evaluation of Other University Duties

Other university duties are occasionally assigned for special activities such as administrative duties or other special projects. Since the nature of these assignments is variable, no attempt is made to specify evaluation weights for other university duties in Table 1. 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 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 current UCF-UFF Collective Bargaining Agreement (CBA).

Relationship between Annual Evaluation and Tenure/Promotion

The result of a faculty member's annual evaluation in the College of Business Administration is just one of 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 current UCF-UFF Collective Bargaining Agreement and changes in the Department and College missions and objectives.

Data to be Included in the Spring Annual Report

In general, evaluation periods begin May 8th and continue through May 7th of the following year and include the preceding summer as appropriate. Teaching, Service, and Professional Development (Track A only) contributions are to be reported for the most recent academic year, which will comprise the previous Summer, Fall, and Spring terms. Research contributions are to be reported for the most recent three (3) academic years. Faculty are evaluated in May, and the preceding 36-months will be included in evaluating the research contributions.

Due Date for Faculty Annual Report

Each year, annual reports shall be due to the Department Chair on the date specified by the most recent collective bargaining agreement. The Chair may, at the written request of an employee, provide an extension of up to twenty-one days to submit the annual report.

PART II. EVALUATION PROCESS AND STANDARDS

Overview

After the end of the evaluation period, the Management Chair shall evaluate each faculty member's performance. The evaluation shall follow the standards and procedures described in this document, the 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 tenure track or non-tenure track position classification. Additional effort variation will occur based upon the workload assignment (number of courses) for the faculty member, as described below.

A basic criterion that must be met to receive a Satisfactory evaluation for all faculty is to maintain status as academically qualified with respect to the CBA's AACSB/SACS standards (see Appendix 4), as follows:

Track E & F: Maintenance of CBA's academic qualification standards for AACSB/SACS accreditation at least at the Scholarly Academic (SA)-doctoral level.

Track C: Maintenance of CBA's academic qualification standards for AACSB/SACS accreditation at least at the Scholarly Academic (SA)-master's level.

Track A: Maintenance of academic qualification for AACSB/SACS accreditation in at least one of the following categories: Practice Academic (PA), Scholarly Practitioner (SP), Instructional Practitioner (IP).

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 Professional Development; prior three years for Research). It is the responsibility of the faculty member to thoroughly document activities and accomplishments in the annual report. The faculty member must provide information regarding courses taught on an overload basis or under a supplemental summer agreement. The faculty member may, but is not required to, provide information regarding activities and accomplishments that occur when the faculty member is not under contract (e.g., during the summer semester when the faculty

member does not have a supplemental summer agreement).

Goal Setting Meeting

Each full-time faculty member in the Management Department will meet with the Chair prior to or at the beginning of the evaluation period to discuss the faculty member's intended teaching, service, and research or professional development activities for the period. During or following that meeting, the faculty member and the Chair will agree on intended exemplary activities in each area of assignment, except research, as well as how those activities will be evaluated, if accomplished.

Standards with respect to research are pre-established as described below. With respect to teaching, service and professional development, the exemplary activities are intended to be significant and consequential endeavors, aligned with program, department, and college goals. Because the exemplary activities are to be significant and consequential, requiring substantial levels of time and effort, those exemplary activities can be relatively few in number.

The level of the exemplary activities engaged in by a faculty member will be a function of the faculty member's workload assignment, position classification, and rank in position. For example, a tenured professor on a 3-course load would be expected to successfully complete higher-level service exemplars (e.g., serve on university committees, chair departmental CPE/promotion/tenure committees, serve as Associate Editor) than an instructor on an 8-course load. Similarly, a tenured professor would be expected to engage in teaching exemplary activities that extend beyond the domain of an instructor (e.g., doctoral student mentoring).

The faculty member and the Chair will come to agreement on specific exemplar activities as well as goals for those activities. These activities and goals will be recorded on the Faculty Member Annual Goals form found in Appendix 2, which shall be signed by the faculty member and the Chair. If agreement is not reached, the faculty member may appeal to the Dean or Dean's representative to establish goals or may proceed with intended activities and be evaluated based on the standards stated in each section of this document.

The faculty member can request a meeting with the Chair during the evaluation period to discuss changes to the agreed upon goals. If there is agreement on new activities and/or goals, a new Faculty Member Annual Goals form will be completed and signed.

Agreed upon goals and activities for each faculty member will be available for review by all faculty members in the department.

Evaluation of Each Area of Assignment

Each of the remaining sections of this document relates to an area of assignment: Teaching, Research, Service, and Professional Development. For each area of assignment, minimum standards for achieving an evaluation rating of Satisfactory are described. In the Research area, evaluations higher than the Satisfactory level are achieved through additional publications beyond what are required for a Satisfactory rating along with activity/success on exemplary activities defined for this assignment area. In the Teaching, Service, and Professional Development areas, evaluations higher than the Satisfactory level are achieved through success on exemplary activities defined for those assignment areas. In general, the evaluation ratings in each area of assignment are determined as follows (with the additional publication proviso for the Research area):

Outstanding will be assigned if the faculty member meets the minimum standards for a rating of Satisfactory in the area of assignment and either (a) there is evidence of success in substantially more of the listed additional exemplary activities, in quality, difficulty, variety or number of occurrences, than a majority of the faculty member's peers or (b) the faculty member has achieved the goals agreed to by the faculty member and Chair at the beginning of the evaluation period for

specific exemplary activities in that area of assignment.

Above Satisfactory will be assigned if the faculty member meets the minimum standards for a rating of Satisfactory and either (a) there is substantive evidence of multiple listed additional exemplary activities or (b) the faculty member has made substantial progress toward the achievement of the goals and/or the successful completion of the specific exemplary activities in that area of assignment agreed to by the faculty member and Chair at the beginning of the evaluation period.

Satisfactory will be assigned if the faculty member meets the minimum standards for a rating of Satisfactory and there is little or no evidence of any additional exemplary activities in the area.

Conditional will be assigned if the faculty member does not meet the minimum standards for a rating of Satisfactory for the current evaluation period and was not assigned a Conditional or Unsatisfactory rating in the area for either of the previous two evaluation periods.

Unsatisfactory will be assigned if the faculty member does not meet the minimum standards for a rating of Satisfactory for the current evaluation period and was assigned a Conditional or Unsatisfactory rating in the area for either of the previous two evaluation periods.

It will be the burden of the Department Chair to document and present evidence whenever it is deemed that a faculty member should receive an evaluation rating that is below Satisfactory in any area of assignment.

Overall Annual Performance Evaluation

In general, the overall annual evaluation rating shall be calculated as the weighted average evaluation over all areas of assignment, where the evaluation in each area is assigned a number as follows:

- Outstanding = 4
- Above Satisfactory = 3
- Satisfactory = 2
- Conditional = 1
- Unsatisfactory = 0

The weight for each area shall be the assignment of effort for the area, as indicated in Table 1 above. The numerical result shall be rounded to the nearest whole number and the overall rating of Outstanding, Above Satisfactory, Satisfactory, Conditional, or Unsatisfactory shall be assigned following the preceding numerical equivalences (e.g., 3.50 rounds to 4 which is an evaluation of Outstanding, whereas 3.49 rounds to 3 which is an evaluation of Above Satisfactory.)

There are three exceptions to this annual Overall Rating determination:

- (a) Faculty members cannot receive an overall annual evaluation rating that exceeds the rating on their highest weighted workload assignment.
- (b) If a faculty member receives an evaluation of Unsatisfactory in any area of assignment, the faculty member's overall rating shall be Unsatisfactory for the evaluation period.
- (c) Similarly, if a faculty member receives an evaluation of Conditional in any area of assignment, the faculty member's overall rating shall be Conditional for the evaluation period.

PART III. STANDARDS FOR TEACHING AND STUDENT ENGAGEMENT

Overview

The Management Department Chair will evaluate the teaching and student engagement performance and effectiveness of the faculty member for the evaluation period as part of the annual evaluation process.

The faculty member's primary goal in teaching should be to foster student learning; therefore, the focus of these evaluation standards is on activities and accomplishments that directly foster learning by the faculty member's students. The evaluation of teaching is not a simple counting of the number or variety of activities; it seeks to measure both efforts expended, progress made, and outcomes achieved.

Sources of Information

In forming the evaluation of teaching and student engagement, the Chair will consider the faculty member's teaching assignment for the year (number and types of courses) and may gather information from:

- teaching and student engagement-related materials submitted by faculty members as a part of their annual report;
- feedback from students, peers, and others regarding the faculty member's teaching performance and effectiveness. If the Chair receives negative feedback that might reasonably be expected to impact the faculty member's annual evaluation, the faculty member will be informed of this feedback in writing as soon as practicable and provided the opportunity to respond to it;
- written reports such as Student Perception of Instruction (SPI) numerical feedback and written comments, Faculty Center for Teaching and Learning reports of attendance at sessions, etc.;
- teaching observations and evaluations, if conducted. If the Chair, designee, or peer conducts observation and evaluation of teaching, it will be done according to the requirements of the current UCF-UFF collective bargaining agreement and on an equitable basis (e.g., some defined group such as all faculty members in the first two years of UCF employment, all faculty members earning evaluations below Satisfactory in the previous year, etc.).

Teaching Activities: Defined

For purposes of evaluation in the Department of Management, a teaching activity is defined as any in which the faculty member individually mentors, instructs, debates, discusses, or advises a UCF student or group of students. Teaching activities also include the time and effort expended in the preparation of materials for these types of engagements, as well as the time and effort expended in any student assessments for these activities. Thus, acting in the role of faculty advisor to a student organization is classified as a teaching-related activity, as would making a presentation to a student group or The Exchange, or serving as a member on a dissertation committee. However, an activity such as "grading a PhD comprehensive exam" would be considered a service activity since the grading is done without direct student interaction. Also, participating in selection interviews for graduate students would be considered service as it is not a teaching activity.

Minimum Standards for a Satisfactory Rating

The minimum standards for teaching and student engagement focus on the faculty member's teaching assignment, including work outside of the classroom that supports assigned classes and the students

enrolled in them.

In order to earn a rating of Satisfactory or higher, the faculty member **must do all** of the following:

As a teaching professional:

- maintain academic and/or professional qualifications necessary under accreditation standards (SACSCOC and AACSB) for your faculty classification and rank within that classification;
- if the prior evaluation period's overall teaching evaluation was below satisfactory, attend at least two sessions or events during the current evaluation period designed to improve teaching quality. This could include FCTL winter or summer conferences or other training and learning sessions scheduled throughout the year, attending CBA/department teaching seminars, teaching-related sessions at academic conferences, online webinars on teaching, CDL, etc.;
- adhere to the standards of conduct described in the UCF Faculty Handbook; and
- participate and contribute to the Department's review and refinement of the assessment process and outcomes.

For each course taught during the annual evaluation period:

- provide a syllabus that meets all university, college, and department requirements and includes clearly stated course objectives, learning outcomes, and evaluation (grading) procedures;
- structure and deliver the course to achieve the stated learning outcomes and be consistent with the course's description in UCF's undergraduate or graduate catalog;
- provide informative and timely performance feedback to students (e.g., grades and comments on assignments) using the rubrics established for the course;
- if applicable, collect and provide data or feedback needed for course and program assessment of learning in a timely manner;
- act in a professional manner and show proper respect for students in classroom settings, in face-to-face meetings, and in communications (this requirement does not preclude having high expectations for student efforts, behavior, or learning);
- hold classes as scheduled, including a final exam or other activity, during the scheduled final exam period, unless a written exemption is granted by the Chair in advance;
- be available to meet with students by appointment in-person, by phone, or online (e.g., Zoom or Teams) and respond to student emails and phone calls in a timely manner;
- course content and materials (text, lectures, cases, slides, online content, etc.) must reflect contemporary research and practice in the discipline;
- use appropriate course technology (e.g., Webcourses, Simple Syllabus);
- earn an aggregate rating of Good, Very Good, or Excellent for "Overall Effectiveness of the Instructor" from at least 50% of students responding to the Student Perception of Instruction (SPI) instrument in each of the instructor's assigned courses taught during the evaluation period; and
- receive evaluations of Satisfactory or higher on teaching observations, if conducted (the rubric for teaching observation feedback will be provided to the faculty member in advance).

Exemplary Activities

If the faculty member meets the minimum standards for a Satisfactory rating, the Chair will consider a faculty member's additional activity for evidence of exemplary performance. During the annual goal setting meeting, the Chair and each faculty member will agree on intended exemplary activities. In weighing the contribution of exemplary activities, the Chair may consider the effort expended, the substance, depth and strategic importance of the activity, and the outcome achieved for each exemplar on a faculty member's

annual statement of goals. Exemplary activities for teaching may include:

1. Course Content/Delivery Exemplars

- Successfully deliver a course to take it significantly beyond the scope normally associated with the topic listing in a textbook, and/or topics normally covered in the course.
- Successfully develop and/or manage a program-wide student competition as part of course requirements (e.g., capstone competition).
- Prepare and deliver a new course that you have not taught before.
- Successfully teach multiple in-load course preps (2 or more) in a semester.
- Successfully develop and/or deliver a high impact international educational experience for students through faculty-led exchanges.
- Strategically integrate guest speakers into a class who provide perspectives that enhance student learning beyond the text and/or the instructor.
- Successfully integrate a new service learning experience into a course(s).
- Employ challenging new student projects with companies/organizations in the region.
- Propose and deliver a new course never before offered at UCF.
- Receive grant funding for teaching related activities, including internal UCF grant programs.
- Win a college-wide or university-wide teaching award. (Winning a College, University, or Professional Association's teaching award is *prima facie* evidence of Outstanding Teaching.)
- Prepare and deliver a teaching workshop for FCTL.

2. Course Rigor

- Type, number, and level of deliverables in a course are at a level expected for the specific course, recognizing that different programs and courses within the curriculum vary in expectations.
- Grade distributions in courses taught are at a level expected for the specific course.

3. Student Engagement

- Serve with distinction as chair or co-chair of Ph.D. dissertation committee.
- Serve with distinction as a member of a dissertation committee.
- Serve with distinction as Honors-in-Major thesis committee chair/co-chair.
- Serve with distinction on Honors-in-Major committee member.
- Successfully supervise one or more independent studies, interdisciplinary studies, or directed research projects.
- Organize and manage successfully a directed research seminar series for undergraduate or graduate students.
- Serve with distinction as a faculty advisor to a registered, business-related, student organization.
- Participate with distinction in a formal student mentoring program.
- Serve with distinction as an advisor/mentor to one or more student competition teams.
- Participate in student-focused events in which you have a speaking role (e.g., Welcome to the Majors, Job Fairs, Career Fest, student competitions)
- Participate as a speaker at The Exchange.
- Develop or maintain internship opportunities for management students.

PART IV. STANDARDS FOR RESEARCH

Overview

Faculty with a research assignment will be evaluated on the basis of research publications, supplemented with a variety of additional research exemplars. The research publication component of

this assignment dimension will be evaluated on the basis of publication activity over the most recent three-year period, while the additional research exemplars will be evaluated for only the current review year.

The Chair shall consider the research productivity and the contribution of this productivity to each faculty member's research program and to the mission and goals of the Department and College. This assessment includes the quantity and quality of publications in scholarly journals and other academic outlets, research contracts and grants, and other exemplar activities, as noted below. A representative listing of journals with their respective categories is provided in Appendix 3. Unlisted journals ranked 4* by the Chartered Association of Business Schools (e.g., *Management Science*, *Academy of Management Annals*, *Psychological Bulletin*) may be considered in consultation with the Department Chair.

To encourage cross-disciplinary collaboration at college level, publications in journals in one department will be treated the same way as it is treated in another department. Thus, if a faculty member in Department A gets a publication in a journal listed as Tier 1 in Department B, it is treated as a Tier 1 publication by the home department. The same would be true for a publication in a Tier 2 journal.

If a faculty member publishes in fields outside of business and economics, or in journals not included in either the Tier 1 or the Tier 2 lists, the faculty member is required to provide evidence of the quality of the outlet through documents such as the AESP from the UCF department where the journal is used in annual evaluations and/or from some respected third party ranking of journals in the field.

Sources of Information

In the evaluation of research and creative activity, the Chair will assess the caliber of the faculty member's most recent three-year publication record as measured by the categories of the journals in which those publications appear. Newly hired faculty members direct from a Ph.D. program may count their publications from their programs, as long as the 36-months window is not exceeded. New faculty with prior academic experience who bring no credit (zero years) towards promotion/tenure may count research publications from their prior positions, as long as the 36-months window is not exceeded. Newly hired faculty members who bring some years' credit towards tenure from prior positions may count research publications from those prior positions, as long as the 36-months window is not exceeded. The chair will rely on information provided in the faculty member's annual evaluation portfolio to gauge the quality and quantity of the supplemental research activities (exemplars) engaged in during the annual evaluation period, again with a window not to exceed 36-months.

Minimum Standards for a Satisfactory Rating

A rating on research activities will only be provided for Management faculty who have a research assignment. Generally speaking, faculty in the Instructor classification (Track A) will have no research assignment but instead be provided an evaluation for professional development (see professional development section elsewhere in the document).

Minimum Standards for All Research Evaluation Ratings

Different workload assignments carry with them different research expectations; therefore, minimum standards for the various ratings will be a function of the research assignment percentage, as determined by the assignment workload. Furthermore, faculty in the Track C Lecturer classification and Track C tenure track classifications have different journal lists as appropriate to their role in the department and college's mission.

Tenured and Tenure Track Faculty

Table 2 summarizes the research accomplishments necessary to obtain the various evaluation ratings for the different workload assignments.

Minimum Standards for Research Ratings by TTE Faculty Workload

	Tenured and Tenure-Track Faculty Workload Tracks		
	Track C	Track E	Track F
Outstanding	At least one Tier 2 (or above) publication and substantial evidence of “exemplar” activity as described below.	At least one Tier 1 publication and substantial evidence of “exemplar” activity as described below.	At least two Tier 1 or Tier 2 publications, one of which must be Tier 1, and substantial evidence of “exemplar” activity as described below.
Above Satisfactory	At least one Tier 2 revise and resubmit (within the current evaluation year) and substantial evidence of “exemplar” activity as described below.	At least one Tier 1 or Tier 2 publication and evidence of “exemplar” activity as described below.	At least one Tier 1 publication and substantial evidence of “exemplar” activity as described below.
Satisfactory	Meets the minimum AACSB requirements to teach master’s courses.	At least one Tier 2 publication and demonstration of a programmatic approach to research during the 3-year evaluation window targeted at Tier 1 journals.	At least one Tier 1 or Tier 2 publication and demonstration of a programmatic approach to research targeted at Tier 1 journals during the 3-year evaluation window.

Conditional will be assigned on research if the faculty member does not meet the minimum standards for a rating of Satisfactory for the current evaluation period and was not assigned a Conditional or Unsatisfactory rating on research in the previous evaluation period.

Unsatisfactory will be assigned on research if the faculty member does not meet the minimum standards for a rating of Satisfactory for the current evaluation period and was assigned a Conditional or Unsatisfactory rating on research in the previous evaluation period.

For all faculty members with a research assignment, the chair has the discretion to evaluate and apply research equivalencies (e.g., Tier 2 publications) to the minimum publication standards in the table above, as well as the discretion to evaluate the contribution, value, and quality of out-of-field (non-management) publications, and to utilize judgment in the evaluation of research activity of lecturers and instructors.

Publication shall be measured by the date on a letter (email acceptable) from the outlet’s editor indicating final acceptance for publication, excepting only required formatting changes, copyright releases, or similar procedural issues.

Exemplary Activities

The minimum standards described in Table 2 include both publications and other exemplary research-oriented activities. The Chair will take the current year's exemplary activities into account, the effort expended, the substance/depth of the activity, and the outcome achieved for each exemplar on a faculty member's annual statement of goals. Potential exemplary research activities include:

- A strong portfolio of research in progress
- Successful completion of other research-related activities as assigned by the Chair during the current evaluation year
- Research presentations made to the business community (current evaluation year)
- Publication of research books or research monographs (during the 3-year window)
- Research presentations at international, national and regional conferences (current evaluation year)
- Accepted and conditionally-accepted publications in proceedings of national and international conferences (current evaluation year)
- Research workshops conducted (internal and external) during the current evaluation year
- Principle or co-investigator on external research contract or grant \geq \$50,000
- Evidence that faculty member has established an international/national reputation in a specific area of research
- Guest research lectureship at other colleges, universities, and institutes during the current evaluation year
- Co-authored article(s) with doctoral students in a peer-reviewed journal (acceptance in current evaluation year).
- Sole authorship in a top journal (Tier 2 or above) during the 3-year window
- Publications that have a particularly strong impact/contribution/significance to theory, method, and/or practice as indicated by citation indices, etc. (3-year window)
- Best publication award by a national scholarly organization or journal (date of award in current evaluation year)
- Best paper award at a national conference (date of award in current evaluation year)
- Internal and external awards recognizing published research (current evaluation year)
- Significant international, national, or regional awards (current evaluation year)
- *Significant research award (s) from journals, external organizations, etc. during the current evaluation year
- *RIA award from UCF (date of award in current evaluation year)
- *University Excellence in Research Award (date of award in current evaluation year)
- *University Pegasus Professor Award (date of award in current evaluation year)
- *CBA Excellence in Research Award (date of award in current evaluation year)

Notes: (1) The above list of research exemplars is not exhaustive; faculty members may bring to the attention of the chair and document activities not included in the above list that may be counted towards the research performance evaluation. (2) Winning any of the research awards marked with an asterisk (*) during the evaluation year results in a research evaluation of Outstanding for the current evaluation year. (3) The faculty member and Department Chair may determine that certain research activities requiring extraordinary time commitments may count as more than one research activity. (4) For all faculty members with a research assignment the chair has the discretion to evaluate and apply research equivalencies to the minimum publication standards in the tables, as well as the discretion to evaluate the contribution, value, and quality of out-of-field (non-management) publications, and to utilize judgment in the evaluation of research activity of lecturers and instructors.

In addition, in the service section that follows, the list of exemplars includes a few professional service activities that could be construed to enhance the research mission of the department for they reflect distinctive accomplishments that stem from the faculty member's research expertise or visibility. As such, it will be left to the Chair and the faculty member to make the determination of whether such activities will apply toward the research or service evaluation. These exemplars include:

- serving as a member of a journal’s Editorial Review Board, especially for Tier 1 and Tier 2 journals.
- serving as an Action Editor, Editor-in-Chief, or special issue Editor especially for Tier 1 and Tier 2 journals.
- elected leadership to governing boards in professional associations, especially at the national/international level.
- elected officer in professional association, especially at the national/international level.

Track C Non-tenure track faculty

While we encourage our non-tenure track faculty colleagues to publish in academic journals, we recognize that their skills, interests, allocation of effort and value to the College may be also expressed through publications in outlets meant to influence practice or the ways we best prepare our students to compete in today’s world. This can be done through publication in highly visible practitioner journals associated with the faculty’s areas of interest, articles in journals that focus on teaching pedagogy in our disciplinary fields, or publication of case studies that can be used to teach the next generation of business leaders.

Table 3: Evaluation of Research Quantity & Quality for Non-Tenure Track Faculty on a 3/3 load

Outstanding	1 Clinical Tier 1 or 2 Clinical Tier 2 (relevant to discipline) plus substantial exemplary research activities.
Above Satisfactory	1 Clinical Tier 2 AND Either 1 R&R at Tier 2 or 1 conference paper likely to lead to journal publication plus substantial exemplary research activities.
Satisfactory	1 Clinical Tier 2 plus substantial exemplary Research activities.

A wide array of publication outlets exists for this kind of work. The two Clinical tiers presented in Appendix 3 comprise the most recognizable and visible outlets for this kind of work and are not meant to capture the universe of reputable outlets that could be part of a successful portfolio of publications that merit evidence of excellence in research/professional development.

Clinical faculty who publish in other outlets must provide evidence of their impact at the time of their evaluation either through the most recent JCR citation impact factors or paid circulation data at the time of publication.

Non-tenure earning faculty will receive Tier 1 credit for any such unlisted publication that either has an impact factor above 1.5 or a paid circulation in excess of 50,000.

Non-tenure earning faculty will earn Tier 2 credit for any such publication that has an impact factor above 0.5 or a paid circulation in excess of 10,000.

Predatory Journals

We caution all our colleagues to avoid predatory journals. Predatory journals are unethical publications that exploit the need for researchers to publish their work by charging high fees without providing legitimate peer review, editorial standards, or proper indexing. These journals often prioritize profit over quality and academic integrity, misleading authors into believing their work is

being published in a reputable outlet. They typically lack transparency in their editorial process, have low academic standards, and may deceive readers by mimicking credible journals in appearance and name.

All faculty must exercise caution by verifying journals through trusted sources like Directory of Open Access Journals (DOAJ), Journal Citation Reports (JCR), or Beall's List of Predatory Journals. Publication in predatory journals cannot be used as valid evidence of research or professional development activity.

PART V. STANDARDS FOR SERVICE

Overview

The Chair of the Management Department will evaluate the department, college, university and professional service efforts and achievements of the faculty member for the evaluation period as part of the annual evaluation process. The faculty member's primary goal in service should be advancing the interests and meeting the needs of the university (i.e., Management Department, College of Business, University of Central Florida) and the profession (e.g., academic associations, research publication outlets, and practitioner associations). The evaluation of service is not a simple count of the number or variety of activities; it seeks to measure time and effort expended as well as outcomes achieved. The 10% service commitment, common to all faculty, equates to approximately 150 hours over the course of the academic year. It will be the responsibility of the faculty member to document the service activities, time expended, and outcomes achieved in the Faculty Annual Report. There are many service assignments and activities that individually may seem minor, but collectively are critical to the day-to-day operation of the department, college, and university. Faculty will benefit from participation in such activities to the extent that they contribute toward the service time commitment expected for a Satisfactory service evaluation. Effort and outcome on exemplary service activities (described later) are what can elevate the service evaluation to an Above Satisfactory or Outstanding level.

Sources of Information

In the evaluation of service, the Chair will consider the faculty member's interests, opportunities for service, and any service activities and related goals to which the faculty member and Chair agreed at the beginning of the evaluation period. The Chair may gather information from:

- materials related to service submitted by the faculty member as a part of his or her annual report, which should thoroughly document all activities;
- public sources of information relating to the faculty member's service activities;
- committee chairs, administrators and/or others familiar with a faculty member's contributions.

Minimum Standards for a Satisfactory Rating

To earn a rating of Satisfactory or higher, expectations of faculty members are a function of their faculty classifications as follows:

All faculty members are expected to:

- attend department and college faculty meetings, as scheduled;
- serve with distinction on at least one department, college, or university committee as requested;
- actively participate in Departmental research seminars such as internal presentations by Departmental colleagues and/or graduate students (especially for Track E and F faculty).

Exemplary Activities

The following are examples of service activities that benefit the department, college, university, profession, and/or business community. These activities are not weighted equally. The Chair will take

into account the effort expended, the substance/depth of the activity, and the outcome achieved. Exemplary activities may include:

Exemplary University Service Examples:

- successfully developing, growing or sustaining a signature program for 30-50 high achieving students in the program;
- successfully developing, growing or sustaining a community-focused conference (perhaps in conjunction with other organizations);
- successfully fund-raising for the program or college (such as sponsorships of events or courses);
- providing valuable internal consulting services for the university, the college, or our students, such as service as a Blackstone Launchpad faculty fellow;
- serving with distinction on **additional** department, college, or university committees as agreed upon with the Department Chair;
- preparing and grading Ph.D. comprehensive exam questions;
- coordinating the collection of data and preparation of the undergraduate assessment document;
- coordinating the collection of data and preparation of the MSM assessment document;
- serving with distinction on department, college, or university committees that meet regularly and perform a critical service or accomplish a major task.
- serving with distinction as a judge for a student competition or for student projects/presentations (e.g. University undergraduate research competition);
- arranging for guest speakers for other faculty members' classes or for The Exchange;
- serving as a guest speaker in another class in the CoB or at The Exchange;
- delivering a "talk" to a registered student organization about a Management related topic;
- attending one university graduation ceremony at which CoB students graduate per year;
- attending and participating in one Welcome-to-the-Majors event per year;
- serving with distinction as Chair of any formal or ad hoc college committee;
- proposing and assisting in implementing an initiative for the benefit of the college (e.g., a cross-discipline conference on AI in teaching);
- attending the president's state of the university event;
- serving as the department's representative on Faculty Senate.

Exemplary Professional Service Examples:

Academic Profession

- serving with distinction as a member of a journal's editorial review board, especially for Tier 1 or Tier 2 journals;
- serving with distinction as an area editor, especially for Tier 1 or Tier 2 journals;
- serving with distinction as an editor-in-chief, especially for Tier 1 or Tier 2 journals;
- Serve as an external reviewer at another university.
- successfully delivering professional presentations to an academic association (e.g. AOM Professional Development Workshops);
- serving as track or session chair, discussant, and/or panel member at academic conferences;
- participating in the activities of a professional association (e.g., consortia organizer, track-Chair), especially at the national/international level;
- holding an elected position in a governing board of an academic associations, especially at the national/international level;
- holding an elected office in an academic association, especially at the national/international level.

Business Community

- successfully delivering professional presentation to practitioner associations (e.g., SHRM, Project Management Association, etc.) ;

- serving as a judge for a professional competition (e.g., Entrepreneur of the Year Award)
- delivering a professional presentation in the Dean's Speaker Series;
- participating in designated activities of a professional practitioner association (e.g., regularly attend GO-SHRM meetings);
- holding an elected position in a governing board of a practitioner association;
- holding an elected office in a practitioner association;
- building relationships/involvement with industry that benefit the department, college, and/or university in some tangible way.

PART VI. STANDARDS FOR PROFESSIONAL DEVELOPMENT

Overview

The Chair of the Management Department will evaluate the professional development efforts and achievements of the faculty members who have no research assignment for the evaluation period as part of the annual evaluation process (typically faculty at the rank of Instructor, Associate Instructor, or Senior Instructor). The faculty member's primary goal in professional development should be to maintain and extend subject matter expertise in areas related to the teaching assignment. The evaluation of professional development is not a simple counting of the number or variety of activities; it seeks to measure time and effort expended as well as outcomes achieved. The 10% professional development commitment required of instructors equates to approximately 150 hours over the course of the academic year. It will be the responsibility of the faculty member to document the professional development activities, time expended, and outcomes achieved in the Faculty Annual Report.

Sources of Information

In the evaluation of professional development, the Chair will consider the faculty member's typical and anticipated teaching assignments and any professional development activities and related goals to which the faculty member and Chair agreed at the beginning of the evaluation period. The Chair will gather information from:

- materials related to professional development submitted by faculty members as part of their annual reports, which should thoroughly document all activities; and
- public sources of information relating to the faculty member's professional development activities.

Minimum Standards for a Satisfactory Rating

In order to earn a rating of Satisfactory or higher, the faculty member **must do all** of the following:

- maintain currency and relevancy for someone who is teaching the undergraduate courses typically assigned to the faculty member, as defined by AACSB and SACSCOC, which accredit the College of Business Administration and/or the Management Department; and
- successfully complete the exemplary activities identified with the Chair during the faculty member's annual goal meeting

Exemplary Activities

The following are examples of professional development activities that sustain and improve subject matter expertise. Activities must be directly related to the teaching assignment or needs of the Management Department. In annual evaluation meetings, faculty members and the Chair will identify exemplary activities for the academic year and the weight/importance of each. During evaluation, the Chair will consider effort expended, the substance and depth of activities, and outcomes achieved.

- continuing education, either in a degree program or non-degree program;
- consulting work and outside activity (e.g., board membership; business ownership) that is not a conflict of interest (See UCF Policy 3.018);

- recognized authority on a topic by national or local media outlets;
- achieving or maintaining professional certification (e.g., SHRM certification; PMP);
- publication in academic¹ or practitioner-focused outlets;
- invited presentation at an academic or professional conference;
- attendance at an academic or professional conference;
- teaching executive education;
- editing and/or reviewing articles or books for possible publication (not self-published);
- reviewing textbooks;
- publishing case studies;
- serving as an expert witness.

Repetition of these activities, when possible, will provide additional justification for a higher rating.

APPENDIX 1

WORKLOAD ASSIGNMENT PROCEDURES AND CRITERIA

Criteria

1. Each faculty member's Chair/Director, in consultation with the Dean, will determine the appropriateness of the requested workload assignment. The determination will be based upon the relationship between that requested assignment and both the college's mission and goals and the needs and the professional development of the faculty.
2. Faculty members' annual evaluations will be based upon their workload assignments for that year specifying teaching, research, professional development, and service responsibilities.

Procedures

1. Each year, faculty members in every classification will have a workload assignment based on their intended activities. Each workload assignment will be discussed with the Department Chair and approved by the Dean. The Chair will notify the faculty member of the assignment prior to making the final written assignment. If a faculty member is assigned to a track other than that expected, the faculty member may request a conference with the Chair regarding the assignment.
2. The Department Chair, in consultation with the faculty member, will decide on the distribution of courses between the Fall and Spring semesters. For example, a faculty member assigned to the "F" track (3 courses per year) could teach a 1-2 load, a 2-1 load, a 0-3 load or a 3-0 load. In making this allocation, the Chair will balance the faculty member's research and teaching goals with department teaching needs and objectives.
3. 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 before the start of the Fall semester in which the proposed workload assignment would begin. The Dean must approve all changes in workload assignments.
4. Faculty may appeal workload assignments according to the current UCF-UFF Collective Bargaining Agreement.

APPENDIX 2
FACULTY MEMBER ANNUAL GOALS WORKSHEET

Department of Management
Annual Goals
XXXX-XXXX Evaluation Period

Faculty Member: Click here to enter text.

Faculty Classification: Click here to enter text.

Workload Assignment/Track (Table 1): Click here to enter text.

Type of Submission (check one): Initial Goal Submission Revised Goal Submission

Date of Submission: Click here to enter text.

TEACHING AND STUDENT ENGAGEMENT

Intended Activities

Click here to enter text.

Goal(s)

Click here to enter text.

RESEARCH &/ PROFESSIONAL DEVELOPMENT

Intended Activities

Click here to enter text.

Goal(s)

Click here to enter text.

UNIVERSITY AND PROFESSIONAL SERVICE

Intended Activities

Click here to enter text.

Goal(s)

Click here to enter text.

Signatures

Faculty Member

Date

Management Chair

Date

APPENDIX 3
MANAGEMENT DEPARTMENT JOURNAL LIST†

Tier 1	
<i>Administrative Science Quarterly</i>	<i>Journal of Applied Psychology</i>
<i>Academy of Management Journal</i>	<i>Journal of Management</i>
<i>Academy of Management Review</i>	<i>Strategic Management Journal</i>

Tier 2	
<i>Organization Science</i>	<i>Leadership Quarterly</i>
<i>Personnel Psychology</i>	<i>Organizational Research Methods</i>
<i>Journal of Business Venturing</i>	<i>Research Policy</i>
<i>OBHDP</i>	<i>Strategic Entrepreneurship Journal</i>
<i>Entrepreneurship Theory & Practice</i>	<i>Strategic Organization</i>
<i>Human Relations</i>	<i>Journal of Organizational Behavior</i>
<i>Journal of Management Studies</i>	<i>Journal of Vocational Behavior</i>

Tier 1 Clinical Journals

The journals below are most influential in achieving excellence in research/professional development for clinical faculty in the college, because of their high visibility in practitioner circles, association with a professional organization and/or their influence in the academic community:

<i>Academy of Management Learning & Education</i>	<i>Journal of Economic Perspectives</i>
<i>Academy of Management Perspectives</i>	<i>Journal of Economic Education</i>
<i>Advances in Financial Education</i>	<i>Journal of Financial Education</i>
<i>Business Horizons</i>	<i>Journal of Marketing Education</i>
<i>California Management Review</i>	<i>Journal of Marketing for Higher Education</i>
<i>Harvard Business Review</i>	<i>Organizational Dynamics</i>
<i>Journal of Accounting Education</i>	<i>Sloan Management Review</i>
<i>Issues in Accounting Education</i>	
<i>Journal of Applied Finance</i>	

Tier 2 Clinical Journals

The most influential and widely used publishers of business case studies:

- Harvard Business Publishing
- INSEAD Case Publishing
- Ivey Publishing
- Darden Business Publishing
- Emerald Publishing

† On request, either Department Chair approval or a faculty review panel composed of four tenure track faculty on research tracks will review and evaluate journals not categorized (approval requires 3/4 approval from the committee or Chair approval).

APPENDIX 4

CBA Criteria for AACSB Academic Qualification SCHOLARLY

ACADEMIC (SA):

The SA classification is divided into three sub-categories:

SA-Doctoral

SA-Masters

SA-Undergraduate

Regardless of subcategory, an SA faculty member will generally have the following preparation:

1. A research doctoral degree or J.D. in the area in which the individual teaches, OR
2. A research doctoral degree in a related field. However, the fact that the degree is not in the primary discipline must be offset by relevant in-discipline academic publications.

Typically, the College of Business Administration will grant SA status to newly hired faculty members who earned their research doctorates (or JDs) within the last five years. To maintain SA status, faculty members must show a sustained record of scholarship by publishing in academic journals as noted below:

SA-Doctoral: three academic publications during a rolling 5-year period. Normally, this requirement is met during the preceding five-year period by **three publications in high quality peer reviewed academic journals** related to their area of teaching responsibility.

SA-Masters: two academic publications during a rolling 5-year period. Normally, this requirement is met during the preceding five-year period by **three publications intellectual contributions** with **at least two contributions in peer reviewed journals** related to their area of teaching responsibility.

SA-Undergraduate: one academic publication during a rolling 5-year period. Normally, this requirement is met during the preceding five-year period by **three publications intellectual contributions** with **at least one contribution in peer reviewed journals** related to their area of teaching responsibility.

(NOTE: Generally, a JD will suffice for SA-Doctoral designation only for faculty teaching in the areas of business law or taxation.)

In addition, SA-Undergraduate status will be granted to doctoral students for up to three years after completion of their comprehensive exam or other significant degree milestone.

Finally, administrators shall be deemed to maintain their existing SA qualification for the duration of their tenure as an administrator, plus three years subsequently in order to have time to retool for active faculty status.

PRACTICE ACADEMIC (PA):

A PA faculty member will generally have the following preparation:

1. A research doctoral degree or J.D. in the area in which the individual teaches, OR
2. A research doctoral degree in a related field. However, the fact that the degree is not in the primary discipline must be offset by a history of relevant in-discipline academic publications and related activities.

Typically, the College of Business Administration will grant PA status to faculty members who develop and engage in activities that involve **substantive** links to practice, consulting and other forms of professional engagement (rather than scholarly activities). To maintain PA status, faculty members must show a sustained record of currency and relevance through their scholarship and related activities (examples noted below):

- Publish in practitioner-focused journals and trade publications.
- Engage in significant--in excess of 80 hours annually--related work experience (e.g., service as a consultant, an expert witness, a practicing professional, a corporate board member, a faculty fellow or intern).
- Develop and teach executive education programs in the field—minimum 30 contact hours over a 3-year period.
- Create a business or own and operate a business related to the field of teaching.

For faculty who hold professional designations (e.g., CPA, CFA, members of the bar):

- Provide evidence of having maintained those designations and completed all continuing education requirements.

Administrators shall be deemed to maintain their PA qualification for the duration of their tenure as an administrator, plus one year subsequently in order to have time to retool for active faculty status.

SCHOLARLY PRACTITIONER (SP):

An SP faculty member will typically hold a Master's degree in an area related to the courses they teach. SPs are required to maintain currency and relevance through continued professional experience and/or engagement related to their professional background.

Typically, the College of Business Administration will grant SP status to faculty members who enhance their background by engaging in activities involving substantive scholarly activities in their fields of teaching. To maintain SP status, faculty members must show a sustained record of currency and relevance through their scholarship and related activities (examples noted below):

- Publish an article in a refereed journal.
- Publish a scholarly book.
- Present scholarly work at a national or major regional academic conference
- Serve as a member of a refereed journal's editorial review board.
- Serve as an editor of a refereed journal.

INSTRUCTIONAL PRACTITIONER (IP):

An IP faculty member holds at least a Master's degree in an area related to the course taught. IP faculty who have 10 years or more of exceptional experience, demonstrated by professional experience in the corporate world, are qualified to teach in Professional or Executive Master degree programs. IPs are required to sustain currency and relevance through continued professional experience and/or engagement related to their professional background. Typically, IP status is designated for newly hired faculty members with significant professional experience as outlined below. To maintain IP status, faculty members must show a sustained record of currency and relevance through their scholarship and related activities (examples noted below):

- Engage in significant--in excess of 80 hours annually--related work experience (e.g., service as a consultant, an expert witness, a practicing professional, a corporate board member, a faculty fellow or intern).
- Develop and teach executive education programs in the field—minimum 30 contact hours over a 3-year period.

- Create a business or own and operate a business related to the field of teaching.
- Publish a case study or technical report in the discipline.

For faculty who hold professional designations (e.g., CPA, CFA, members of the bar):

- Provide evidence of having maintained those designations and completed all continuing education requirements.

SCHOLARLY PRACTITIONER (SP):

An SP faculty member will typically hold a Master's degree in an area related to the courses they teach. SPs are required to maintain currency and relevance through continued professional experience and/or engagement related to their professional background.

Typically, the College of Business Administration will grant SP status to faculty members who enhance their background by engaging in activities involving substantive scholarly activities in their fields of teaching. To maintain SP status, faculty members must show a sustained record of currency and relevance through their scholarship and related activities (examples noted below):

- Publish an article in a refereed journal.
- Publish a scholarly book.
- Present scholarly work at a national or major regional academic conference
- Serve as a member of a refereed journal's editorial review board.
- Serve as an editor of a refereed journal.

INSTRUCTIONAL PRACTITIONER (IP):

An IP faculty member holds at least a Master's degree in an area related to the course taught. IP faculty who have 10 years or more of exceptional experience, demonstrated by professional experience in the corporate world, are qualified to teach in Professional or Executive Master degree programs. IPs are required to sustain currency and relevance through continued professional experience and/or engagement related to their professional background. Typically, IP status is designated for newly hired faculty members with significant professional experience as outlined below. To maintain IP status, faculty members must show a sustained record of currency and relevance through their scholarship and related activities (examples noted below):

- Engage in significant--in excess of 80 hours annually--related work experience (e.g., service as a consultant, an expert witness, a practicing professional, a corporate board member, a faculty fellow or intern).
- Develop and teach executive education programs in the field—minimum 30 contact hours over a 3-year period.
- Create a business or own and operate a business related to the field of teaching.
- Publish a case study or technical report in the discipline.

For faculty who hold professional designations (e.g., CPA, CFA, members of the bar):

- Provide evidence of having maintained those designations and completed all continuing education requirements.