

# ANNUAL EVALUATION STANDARDS AND PROCEDURES

*DEPARTMENT OF MARKETING  
COLLEGE OF BUSINESS ADMINISTRATION  
UNIVERSITY OF CENTRAL FLORIDA*

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## **Introduction**

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

- Provide a range of work assignments that permits 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, with the mission of the department.
- Align the performance appraisal system with the promotion and tenure process.
- Promote high quality research, teaching, and professional service by Marketing 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, research, service activities, as well as any other assigned duties. Overall evaluations will be determined by weighting performance on each of the components by the faculty member's formal assignment of effort on each. Table 1 contains the target weights for teaching, research and service for each workload option based on course assignment (3-credit courses or equivalent) within a regular 9-month contract.

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

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. In particular, each faculty member's annual performance evaluation will be based upon the actual workload for that evaluation period.

### ***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 in proportion to the total amount of time the assignment is weighted in the annual assignment form. 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 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 Collective Bargaining Agreement.

### Relationship between Annual Evaluation and Tenure/Promotion

A faculty member's annual evaluations in the College of Business Administration represent just one of numerous components that are examined and considered in the University promotion and/or tenure 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 promotion or tenure decision.

### Modifications of the Annual Evaluation and Standards Procedures

The plan may require periodic changes and will be revised in accordance with the Collective Bargaining Agreement and changes in the Department and College missions and objectives.

### Information to be Included in the Annual Report

Normally, the performance evaluation period begins May 8<sup>th</sup> and continues through May 7<sup>th</sup> of the following year. Teaching and Service 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 five (5) academic years.

### Due Date for Annual Report

The faculty annual report shall be due no sooner than fourteen (14) days after the end of the Spring semester and no sooner than fourteen (14) days after delivery of the Spring Student Perception of Instruction (SPI) reports to the Department.

## ***PART II – EVALUATION PROCESS AND STANDARDS***

### **Overview**

After the end of the evaluation period, the Department 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.

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 prior year. 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 regular faculty member in the Department of Marketing will meet with the chair prior to the beginning of the evaluation period. The goal of this meeting is to discuss the faculty member's intended teaching, service, and research activities for the period, and arrive at an agreement on 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 and service, the activities are expected to be significant and consequential endeavors, aligned with program, department, and college goals. Because the activities are to be significant and consequential, requiring substantial levels of time and effort, those activities may be relatively few in number. The level of activity 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 workload would be expected to successfully complete higher-level service activities (e.g., university committees, promotion and tenure activities, Faculty Senate, etc.) than an instructor on an 8-course workload. Similarly, that tenured professor would be expected to engage in teaching activity above and beyond the domain of a junior faculty member (e.g., doctoral student mentoring).

The faculty member and the chair will agree on specific 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 his 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 may request a meeting with the chair during the evaluation period to discuss changes to the agreed upon activities and/or goals. If there is agreement on new activities and/or goals, a revised *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**

In the research domain, minimum publications standards are pre-defined for each evaluation level (e.g., outstanding). The evaluation can be influenced, however, by activity/success on the list of exemplary activities that a faculty member can perform/achieve.

In each of the remaining sections of this document relating to an area of assignment, minimum standards for achieving a rating of Satisfactory are described. Additional activities are also considered in order to determine if a rating of Above Satisfactory or Outstanding is warranted. 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 (or the actual effort FTE if different from the table value(s)). 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.) 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.

## ***PART III – STANDARDS FOR TEACHING, RESEARCH, AND SERVICE***

### **A. Teaching**

#### **Overview**

The department chair will evaluate the teaching 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: Teaching**

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 will gather information from:

- teaching and student engagement-related materials submitted by the faculty member as a part of his or her 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;
- reports such as student perception of instruction (SPI) and written comments, Faculty Center for Teaching and Learning reports of attendance at sessions, etc.; and
- 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 collective bargaining agreement and on an equitable basis (e.g., same 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**

It is important to clearly delineate faculty activities that are classified as "teaching-related." For purposes of evaluation in the Department of Marketing, a teaching activity is defined as any in which the faculty member individually mentors, instructs, debates, discusses, and/or advises a UCF student or group of students. 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 at the exchange, or serving as a member on a dissertation committee. However, attending a Meet and Greet event for the PSP would count as service. Grading a PhD comprehensive exam would also be considered a service activity since grading is done anonymously.

### **Minimum Standards for a Satisfactory Rating**

The minimum standards for teaching focus on the faculty member's teaching assignment, including work outside of the classroom that supports assigned classes, the students enrolled in the classes, and potentially, students other than those specifically enrolled in classes. By design, these standards support and affirm the department's and college's commitments to student learning and success. Efforts that are "requested by the chair" will be distributed equitably across the faculty members in the department.

In order to earn a rating of Satisfactory or higher, the faculty member must accomplish all of the following for each course taught during the evaluation period:

- Course content and materials (text, lectures, cases, slides, online content, etc.) must reflect contemporary research and practice in the discipline; current topic coverage, clear application to marketing practice, reflects process of continual review and revision (if course has been taught multiple times);
- syllabus must meet all university, college, and department requirements and include clearly-stated course objectives, learning outcomes, and evaluation (grading) procedures;
- structure and deliver courses as described in the syllabus in order to achieve the stated learning outcomes; appropriate use of technology, e.g., web courses, high-quality course materials, appropriate text/readings, relevant guest speakers, utilizes generally accepted structure/delivery modes in classes, etc.
- provide informative and timely performance feedback to students (e.g., grades and comments on assignments).
- hold classes as scheduled, including a final exam or other evaluated activity during the scheduled final exam period, unless an exemption is granted by the chair prior to the beginning of the teaching term;

- be available a minimum of 1 hour per week for each 3-hour course outside of class for student consultation time, be available for additional appointments with students at mutually convenient times, and respond to student emails and phone calls in a timely manner;
  - 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 across all courses taught during the evaluation period;
  - receive evaluations of Satisfactory or higher on teaching observations, if conducted. A rubric for teaching observation feedback will be provided to the faculty member in advance;
  - if applicable and requested, collect and provide data or feedback needed for course and program assessment of learning on a timely basis; and
- As a member of the Department of Marketing, and/or if requested by the Chair/Dean:
    - take an active part in curricular or program review and accreditation activities;
    - take an active role in curricular or program development;
    - serve appropriately as a committee member on an Honors-in-the-Major thesis;
    - participate in peer teaching observations, if used; and
- as a teaching professional:
    - If prior evaluation period’s overall teaching evaluation was Satisfactory or lower, 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, and teaching-related sessions at academic conferences, online webinars on teaching, CDL, etc.;
    - maintain academic and/or professional qualifications necessary under accreditation standards (SACS and AACSB) for your faculty classification and rank within that classification; and
    - adhere to the standards of conduct described in the UCF Faculty Handbook.

## Critical Teaching Activity Dimensions

If the faculty member meets the minimum standards for a Satisfactory rating as described above, the chair will consider activities undertaken on five critical teaching dimensions listed in the table below:

Teaching Activity Dimension	Above		
	Satisfactory	Satisfactory	Outstanding
1. Course Content/Delivery			
2. Course Rigor			
3. Student Engagement			
4. Student Perception (SPIs)*			
5. Additional Activities per Agreement			
Note: Winning a University, College, or Professional Association's teaching award is <i>prima facie</i> evidence of Outstanding teaching, and the overall evaluation will reflect that.			
* Student Perception (SPIs): Satisfactory (within 0.20 above/below the College mean for the size of course; Above Satisfactory (GT 0.20 above the College mean for the size of course; Outstanding (GT 0.40 above the College mean for the size course. For the lecture capture core courses the College mean for classes GT 100 will be the reference point.			

**Outstanding** will be assigned if the faculty member meets the minimum standards for a rating of Satisfactory in teaching and either (a) there is documented evidence of exceptional levels of quality, difficulty, success, variety, and/or number of occurrences in items related to the dimension, with no apparent improvements needed and/or (b) the faculty member has achieved or exceeded all goals agreed to by the faculty member and chair at the beginning of the evaluation period for specific teaching-related activities.

**Above Satisfactory** will be assigned if the faculty member meets the minimum standards for a rating of Satisfactory on teaching and either (a) there is documented evidence of advanced levels of quality, difficulty, success, variety, and or number of occurrences in items related to the dimension, with few apparent improvements needed, and/or (b) the faculty member has put forth substantive efforts towards and has achieved or exceeded a majority of the goals agreed to by the faculty member and chair at the beginning of the evaluation period for teaching-related activities.

**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 activities in teaching.

**Conditional** will be assigned on teaching 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 teaching for the previous evaluation period.

**Unsatisfactory** will be assigned on teaching 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 teaching for the previous evaluation period.

### Overall Teaching Evaluation:

The overall annual teaching evaluation is determined by the distribution of evaluations on the five dimensions in the table. In order to achieve an overall evaluation of Outstanding, a faculty member must be rated as Outstanding on 3 or more of the dimensions above. Similarly, achieving a rating of Satisfactory on 3 or more of the dimensions will yield an overall evaluation of Satisfactory. An Above



Satisfactory evaluation can be achieved in several ways, for example: Content: Satisfactory; Delivery/Pedagogy: Above Satisfactory; Engagement: Above Satisfactory; SPIs: Outstanding, and Additional activity; Outstanding. The overall evaluation would be Above Satisfactory since Outstanding was achieved on only two of the dimensions. Another example: Content: Satisfactory; Delivery/Pedagogy: Satisfactory; Engagement: Above Satisfactory; SPIs: Above Satisfactory, and Additional activity; Outstanding. The overall evaluation would be Above Satisfactory since, again, only one dimension was rated Outstanding, and only two dimensions were rated Satisfactory.

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 lower than Satisfactory in any area of assignment. In determining the teaching evaluation (Satisfactory, Above Satisfactory, Outstanding) for each of the five dimensions the chair will provide comments that explain how the evaluation was determined. (see example below for *Course Content/Delivery*). If a faculty member does not meet the minimum for a Satisfactory rating on any of the dimensions in the table, the chair will provide suggestions for improvement and will discuss those with the faculty member in person. The expectation is that the problem will be rectified in the next evaluation period.

**Course Content/Delivery:    Satisfactory    Above Satisfactory    Outstanding**

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Critical Teaching Dimensions and Exemplars: Non-Exhaustive Listing**

**1. Course Content/Delivery**

- a. 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.
- b. Deliver course in a fashion that represents a significant departure from the department status quo;
- c. Successfully develop and/or manage a program-wide student competition as part of course requirements, e.g., capstone competition;
- d. Prepare and deliver a new course that you have not taught before; and
- e. Successfully teach multiple in-load course preps (3 or more) in a semester
- f. Successfully developing and/or delivering a high impact international educational experience for students through faculty-led exchanges.
- g. Strategically integrate guest speakers into a class who provide perspectives that enhance student learning beyond the text and/or the instructor.
- h. Successfully integrate a new service learning experience into course(s).
- i. Employ challenging new student projects with companies/organizations in the region.
- j. Propose and deliver a new course never before offered at UCF;

**2. Course Rigor**

- a. 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.

- b. Grade distributions in courses taught are at a level expected for the specific course.

### **3. Student Engagement**

- a. Serve with distinction as chair or co-chair of Ph.D. dissertation committee;
- b. Participate with distinction in a formal student mentoring program;
- c. Serve with distinction as a member of a dissertation committee;
- d. Receive a College or National mentoring award, e.g., Dean's Excellence....;
- e. Serve with distinction as Honors-in-Major thesis committee chair/co-chair;
- f. Serve with distinction on Honors-in-Major committee member;
- g. Successfully supervise one or more independent studies or directed research projects;
- h. Organize and manage successfully a directed research seminar series for UG or MBA students. (multiple students involved);
- i. Serve with distinction as a faculty advisor to a registered, business-related, student organization;
- j. Serve with distinction as an advisor/mentor to one or more student competition teams;
- k. Participate with distinction in student-focused events in which you have a speaking role (e.g., Welcome to the Majors, Majors lunch with the faculty, Job Fairs, Career Fest, student competitions, graduations receptions, etc.; and
- l. Participate with distinction as a Speaker at the Exchange.

### **4. Additional Teaching Activities to Propose in Meeting with Chair:**

There may be additional activities that might be suggested by the faculty member in the meeting with the chair since the above listing is not exhaustive. An example would be preparing and delivering a teaching workshop for FCTL.

## **B. Research**

### **Overview**

Faculty with a research assignment will be evaluated on the basis of research publications, supplemented with a variety of additional exemplary research activities. The research publication component of this assignment dimension will be evaluated on the basis of activity over the most recent five-year period. A specific research publication may be counted for a maximum of five evaluation periods. Research accomplishments will be rated using the weights shown in Table 1.

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 exemplary activities, as noted below. A listing (non-exhaustive) of journals and their respective categories is provided in the Appendix 3.

### **Sources of Information**

In the evaluation of research and creative activity, the chair will evaluate the caliber of the faculty member's most recent five-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 5-year window is not

exceeded. New faculty with prior academic experience who bring no years credit towards promotion/tenure may count research publications from their prior positions, as long as the 5-year window is not exceeded. Newly-hired faculty members who bring some number of years credit towards tenure from prior positions may count research publications from those prior positions, as long as the 5-year 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 five years.

### **Minimum Standards for a Satisfactory Rating**

A rating on research activities will only be provided for department faculty who have a research assignment. Generally speaking, faculty in the Instructor classification will have no research assignment, and instead will be provided an evaluation for professional development (see Professional Development Section). Furthermore, faculty in the rank of lecturer or tenure track classifications have different research assignment weights, so the minimum standards for a satisfactory rating will differ depending upon those research assignment weights. Table 2 below displays those minimum standards for all faculty who have a research activity assignment.

Necessarily, new faculty with publications from their PhD programs and/or prior academic positions will need to establish and accumulate a research record at UCF that is consistent, programmatic, and sufficient in quality and quantity. Thus, research evaluation for faculty with 3 or fewer years of credit towards promotion/tenure will be at the discretion of the chair, and based on quantity and quality of research publications, the programmatic focus of the research, and the nature, quality, and quantity of work in process. In any case, a basic criterion for a Satisfactory evaluation for all faculty is to maintain status as academically qualified with respect to AACSB/SACS, as follows:

**Track F:** Maintenance of academic qualification for AACSB/SACS accreditation (during the 5-year window) at least at the Scholarly Academic (SA)-doctoral level.

**Track E:** Maintenance of academic qualification for AACSB/SACS accreditation (during the 5-year window) at least at Scholarly Academic (SA)-masters level.

**Tracks C and D:** Maintenance of academic qualification for AACSB/SACS accreditation (during the 5-year window) at least at the Scholarly Academic (SA)-master's level.

**Tracks A and B:** Maintenance of academic qualification for AACSB/SACS accreditation (during the 5-year window) in at least one of the following categories: Practice Academic (PA), Scholarly Practitioner (SP), Instructional Practitioner (IP).

### **Cumulative Progress Reviews--Promotion and Tenure**

Prior to the conclusion of the Spring term, tenure-earning faculty members in the Department of Marketing will be independently reviewed each year by a department committee comprised of all tenured faculty members. In addition, reviews will be conducted independently by the department chair and Dean. Each tenure-earning faculty member will submit for review a comprehensive dossier of research publications and work in progress, in addition to his/her annual performance report. Promotion and tenure appraisals are based on cumulative performance, including the current year. Appendix 5 contains the Department of Marketing *Criteria for Promotion and Tenure*.

**Table 2. Research Performance Standards**

<b>Rating</b>	<b>Trk.F-3 Courses</b>	<b>Trk.E-4 Courses</b>	<b>Trk.D-5 Courses</b>	<b>Trk.C-6 Courses</b>	<b>Trk.B-7 Courses</b>	<b>Trk.A-8 Courses</b>
<b>O</b>	Minimum: Two A+ and one A-  Additional: At least 5	Minimum: One A+ and two A-  Additional: At least 4	Minimum: Two A-  Additional: At least 2	Minimum: One A- and one B  Additional: At least 2	Minimum: Two B  Additional: At least 2	Minimum: One B  Additional: At least 1
<b>AS</b>	Minimum: One A+ and two A-  Additional: At least 4	Minimum: One A+ and one A-  Additional: At least 3	Minimum: Two B  Additional: At least 2	Minimum: One B and one additional journal (any category) Additional: At least 2	Minimum: One journal (any category)  Additional: At least 2	Minimum: One journal (any category)  Additional: At least 1
<b>S</b>	Minimum: One A+ and one A-  Additional: At least 4	Minimum: Two A-  Additional: At least 3	Minimum: Two journals (any category)  Additional: At least 2	Minimum: Two journals (any category)  Additional: At least 1	Minimum: One journal (any category)  Additional: At least 1	Minimum: One journal (any category)  Additional: None required

**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.

### **Exemplary Research Activities:**

1. Accepted and conditionally-accepted publications in peer-reviewed journals beyond the requirements in Table 2 (during the 5-year window)
2. Accepted and conditionally-accepted publications in proceedings of national and international conferences beyond the requirements in Table 2 (current evaluation year)
3. Research presentations at international, national and regional conferences (current evaluation year)
4. Internal and external awards recognizing published research (current evaluation year)
5. Best paper award from national or regional conferences (current evaluation year)
6. Principle or co-investigator on external contract or grant  $\geq$  \$50,000
7. Guest research lectureship at other colleges, universities, and institutes during the current evaluation year
8. Research presentations made to the business community (current evaluation year)
9. Significant international, national, or regional awards (current evaluation year)
10. Publication of research books or research monographs (during the 5-year window)
11. \*Significant research award (s) from journals, external organizations, etc. during the current evaluation year
12. \*RIA award from UCF (date of award in current evaluation year)
13. \*University Excellence in Research Award (date of award in current evaluation year)
14. \*University Pegasus Professor Award (date of award in current evaluation year)
15. \*CBA Excellence in Research Award (date of award in current evaluation year)
16. Co-authored article(s) with doctoral students in a peer-reviewed journal (acceptance in current evaluation year).
17. Research workshops conducted (internal and external) during the current evaluation year
18. Sole authorship in a top journal (Category A- or above) during the 5-year window
19. Publications that have a particularly strong impact/contribution/significance to theory, method, and/or practice as indicated by citation indices, etc. (5-year window).
20. Best publication award by a national scholarly organization or journal (date of award in current evaluation year)
21. Best paper award at a national conference (date of award in current evaluation year)
22. Evidence that faculty member has established an international/national reputation in a specific area of research
23. Demonstration of a programmatic approach to research during the 5-year window
24. Successful completion of other research-related activities as assigned by the chair during the evaluation year (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 that require 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-marketing) publications, and to utilize judgment in the evaluation of research activity of lecturers and instructors.

## C. Service

### Overview

The department chair 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., Department, College of Business Administration, University of Central Florida), and the profession (e.g., academic associations, research publication outlets, practitioner associations, etc.). The amount and type of service expected of a faculty member will vary by rank and experience. The evaluation of service is not a simple counting of the number or variety of activities; it seeks to consider both effort expended and outcomes achieved. As such, membership on a committee that measured minimal or no activity or accomplishments during the year would not be counted. In workload tracks A and B (8 and 7 courses, respectively), professional development is included as an activity under service. The "X"s in the table below depict how the expectations for service activity may vary by rank; the table is not a depiction of required activities, realizing that there is always a compensatory nature to service. The actual service activities a faculty member aspires to or engages in will be communicated in the meeting with the chair. It is the expectation that faculty members of advanced rank and/or academic experience will take leadership roles in appropriate areas of service, e.g., chairing a curriculum review committee.

<b>Service To:</b>	<b>Professor</b>	<b>Assoc. Prof.</b>	<b>Assist. Prof.</b>	<b>Lecturer</b>	<b>Instructor</b>
<b>Department</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
<b>College</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>	<b>X</b>
<b>University</b>	<b>X</b>				
<b>Academic Prof.</b>	<b>X</b>	<b>X</b>	<b>X</b>		
<b>Business Prof.</b>	<b>X</b>			<b>X</b>	<b>X</b>

### 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 will gather information from:

- documentation materials related to service submitted by the faculty member as a part of his or her annual report, which should thoroughly describe all activities; and
- public sources of information relating to the faculty member's service activities
- Input from committee chairs, administrators, and/or others familiar with a faculty member's contributions.
- Faculty members on workload tracks A and B will report their professional development activities for the current evaluation period and previous two years.

### Service: Defined

It is important to clearly delineate faculty activities that are classified as "service." For purposes of evaluation in the Department of Marketing, service is defined as any professional activity related to the faculty member's expertise performed (gratis) for the Department, College, University, Marketing Academic profession, Marketing business community, or higher education that supports the operations and advancement of that entity. It would not include any of the activities listed earlier in this document classified as teaching. For example, serving on the College DPRC is service, as is participating as a

grader for PhD comprehensive exams for the department, as is attending a luncheon for students to promote the marketing major, and as is acting as a coach for a local high school business club team preparing for a state competition.

### **Service Activities**

The following are examples of service activities that benefit the program, college, university, profession, and/or business community. These activities are not necessarily weighted equally. The chair will take into account the effort expended, the substance/depth of the activity, leadership roles assumed, and the outcomes achieved.

#### Department of Marketing

- a. Serve with distinction as chair of any formal or ad hoc department committee
- b. Propose and implement an initiative for the benefit of the department, e.g., design and propose a supply chain management minor.
- c. Serve with distinction as a judge for a student competition or for student projects/presentations (note: this could also be at the College or University level).

#### College of Business Administration

- a. Serve with distinction as chair of any formal or ad hoc college committee
- b. Provide valuable internal consulting services for the college, such as service as a Blackstone Launchpad faculty fellow
- c. Propose and assist in implementing an initiative for the benefit of the college, e.g., a cross-discipline conference on nutrition and consumer behavior

#### University of Central Florida

- a. Serve with distinction as chair of any formal or ad hoc university committee
- b. Provide valuable internal consulting services to the university, such as to University Marketing

#### Academic Profession

- a. Serve with distinction as a member of a journal's editorial review board, especially for premier or category A journals
- b. Serve with distinction as an area editor, especially for premier or category A journals
- c. Serve with distinction as an editor-in-chief, especially for premier or category A journals;
- d. Successfully deliver professional presentations to an academic association, e.g. AMA national
- e. Deliver an invited research presentation at a University (not job talks)
- f. Serve as track or session chair, discussant, and/or panel member at academic conferences/symposia
- g. Participate in designated activities of a professional academic association (e.g., AMA consortia organizer, etc.), especially at the national/international level
- h. Hold an elected position in a governing board of an academic associations, especially at the national/international level;
- i. Hold an elected office in an academic association, especially at the national/international level.

#### Business Community

- a. Successfully deliver professional presentation to national/international practitioner associations (e.g., SMPS, NAPM, AMA Professional Chapter, etc.)

- b. Serve as a judge for a professional competition, e.g., Marketer of the Year Award
- c. Deliver professional presentation in the Dean's Speaker Series
- d. Participate in designated activities of a professional practitioner association, especially at the national/international level
- e. Hold an elected position in a governing board of a practitioner association, especially at the national/international level;
- f. Hold an elected office in a practitioner association, especially at the national/international level.
- g. Build relationships/involvement with industry that benefit the department, college, and/or university in some tangible way.

*Professional Development Activities-Tracks A and B*

The following list of activities related to professional development is not exhaustive. These activities are not necessarily weighted equally. The chair will take into account the effort expended, the substance/depth of the activity, and the outcome achieved (Also see Appendix 4).

- Continued education in a degree or non-degree program;
- Substantial consulting work that is paid or unpaid;
- Publish a textbook in some topical area of marketing or closely-related area;
- Receive a competitive internal grant related to teaching, e.g., SoTL;
- Receive an external grant related to teaching;
- Participation in teaching-related local/regional/national workshops or training modules during the evaluation period (e.g. FCTL, CBA teaching seminars, AMA teaching sessions at conference);
- Successfully deliver seminars/presentations (internal/external), e.g., FCTL, Parent's Weekend, New Student Orientations, etc.;
- Complete the IDL6543 class on web class design and development;
- Publish course workbooks, software for classroom use;
- Publish conference proceedings article on education topic;
- Publish a refereed journal article on education topic;
- achieve or maintaining formal professional certification;
- Noteworthy publication in academic<sup>1</sup> or practitioner focused outlets;
- Successful delivery of an invited presentation at an academic or professional conference;
- Actively participate in an academic or professional conference;
- Serve on a consequential industry board;
- Actively participate in an owned business;
- Successfully teach an executive education session;
- Edit and/or review articles or books for possible publication;
- Successful completion of an industry internship;
- Publish substantive case study or studies; and
- Serve with distinction as an expert witness.



<sup>1</sup> Publication of academic research may take more than a single year; therefore evidence of substantive research efforts, such as a completed working paper or a revise-and-resubmit request from a journal, will count as an exemplary activity in one year. Such activities are expected to have led to publication in the second year.

### **Minimum Standards for a Satisfactory Rating-Tenured/Tenure-Earning Faculty**

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

- attend all department and college assembly meetings, as scheduled, unless explicitly excused by the chair;
- serve with distinction on at least two department, college, or university committees.
- attend commencement ceremonies as scheduled and requested by the chair;
- attend at least two of the following events (lunch with the majors, welcome to the major, CBA meeting with the President and Provost, among others)
- review research manuscripts when requested by journal editors and/or conference chairs (tenured/tenure-earning faculty and lecturers)
- actively attend and participate in department workshops and faculty recruiting events
- Complete in a timely fashion any ad hoc service assignment requested by the chair

### **Minimum Standards for a Satisfactory Rating-Non Tenure-Earning Faculty**

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

- attend all department and college assembly meetings, as scheduled, unless explicitly excused by the chair;
- serve with distinction on at least two department, college, or university committees.
- attend commencement ceremonies as scheduled and requested by the chair;
- attend at least two of the following events (lunch with the majors, welcome to the major, CBA meeting with the President and Provost, among others)
- regularly attend events at the Exchange
- maintain academic qualification in one of the following categories: Practice Academic (PA), Scholarly Practitioner (SP), Instructional Practitioner (IP).
- Complete in a timely fashion any ad hoc service assignment requested by the chair

### **Overall Service Evaluation-Tenured/Tenure-Earning Faculty**

The following examples of service activities that would generate different overall evaluations would be used in cases whereby the activities and goals agreement for service was not completed or not agreed upon.

#### **Outstanding**

- a. meets the minimum standards for a rating of Satisfactory, and
- b. serves with distinction on the Editorial Review Board of a Premier journal and/or Editor at a Premier or Category 1A journal (without course release), and
- c. serves a professional organization in a voluntary non-elected service role that brings visibility to UCF. Alternatively, a faculty member who is not an editor might have a major elected role in a national or international professional service organization without course release and serves with distinction.

Note: Winning a University, College, or Professional Association's service award is *prima facie* evidence of Outstanding service and the overall evaluation will reflect that.

#### **Above Satisfactory**

- a. meets the minimum standards for a rating of Satisfactory, and

- b. performs several *ad hoc* reviews for Premier or Category 1A journals and/or serves on an Editorial Review Board, and
- c. organizes a successful professional development session at a conference.

**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 additional service activities.

**Conditional** will be assigned on service 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 service for the previous evaluation period.

**Unsatisfactory** will be assigned on service 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 service for the previous evaluation period.

Note: The Department Chair will have latitude in evaluating the service contribution of new faculty members with 3 or fewer years experience at UCF. 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 lower than Satisfactory in any area of assignment. For service, the comments should indicate strengths and weaknesses in quantity and quality of effort across all types of service. If a faculty member's service activity is subpar, the chair will provide suggestions for how to improve in the next evaluation cycle.

### **Overall Service Evaluation-NonTenure-Earning Faculty**

The following examples of service activities that would generate different overall evaluations would be used in cases whereby the activities and goals agreement for service was not completed or not agreed upon.

#### ***Outstanding***

- a. meets the minimum standards for a rating of Satisfactory, and
- b. chairs a Department or College committee with distinction that has an above average workload (i.e., meets often and/or has a high work volume), and/or serves with distinction on high-profile/heavy workload University-level committee(s), and
- c. serves as an officer in a local community organization related to the faculty member's expertise.
- d. is recognized as a leading local expert in her/his area and is regularly quoted by the media.

Note: Winning a University, College, or Professional Association's service award is *prima facie* evidence of Outstanding service and the overall evaluation will reflect that.

#### ***Above Satisfactory***

- a. meets the minimum standards for a rating of Satisfactory, and
- b. is active in a local professional organization related to the area of teaching,
- c. and is a contributing member of a department or college committee (or multiple committees) that has an above average work load.

**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 additional service activities.

***Conditional*** will be assigned on service 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 service for the previous evaluation period.

***Unsatisfactory*** will be assigned on service 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 service for the previous evaluation period.

## APPENDIX 1

### DEPARTMENT OF MARKETING WORKLOAD ASSIGNMENT APPLICATION

Date \_\_\_\_\_

Faculty Name \_\_\_\_\_ (PRINT)

Faculty Department or School \_\_\_\_\_

Current Workload Assignment \_\_\_\_\_ (No. of courses per academic year)

Proposed Workload Assignment \_\_\_\_\_ (No. of courses per academic year)

Term Proposed Workload Assignment Would Begin \_\_\_\_\_ (Semester & year)

Summary Justification for Assignment (Use only the space below)

**Required Attachments:**

**Current Vita**

**Summary of Research Activities**

**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 the requested assignment and both the college's mission and goals and the needs and the professional development of the faculty.
2. Each faculty member's annual evaluation will be based upon the actual workload for that year. That is, it will be based upon the actual number of courses taught, the actual research assignment, etc.

Procedures

1. Every third year each faculty member will be required to submit an updated Faculty Workload Assignment Application (number of courses within the track range) that will last for a period of three years. This application must be made by September 1 of the year preceding the Fall semester in which the new workload assignment is to begin. The most recent college wide submission of 3-year workload assignment applications occurred in Fall 2013, with the approved assignments taking effect in the Fall 2014 schedule. If a faculty member does not comply with the requirement to submit an updated workload assignment application, the faculty member's workload assignment will be left to the discretion of the unit's chair/director and the dean. Requests for an assignment should be made by submitting the Faculty Workload Assignment Application. Faculty who are hired in the midst of a three-year assignment cycle, as well as faculty who have changed their workload assignment in the midst of a three-year assignment cycle (as provided for in item 4 below), will get on cycle at the next track assignment submission date.
2. After a review of the application, the chair, in consultation with the dean, will make the final decision on track assignment. 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 the track for which application was made, upon receiving that faculty member's written request, the chair will have a conference with the faculty member regarding the approved assignment.

3. 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.
4. A faculty member may request reassignment to a different workload track during the course of a three-year assignment period. This request can be made by submitting a new *Faculty Workload Assignment Application* to the chair by September 1 of the year preceding the Fall semester in which the proposed new workload assignment would begin. The process for reviewing and responding to the application will be the same as the process described in item 2 above. The dean must approve all changes in workload assignments.
5. Faculty may appeal workload assignments according to the Collective Bargaining Agreement.

## Summary of Research Activities

1. Describe the research theme(s) that you will emphasize over the upcoming three years. Indicate why you believe this theme(s) is important.
2. Complete the following Faculty Research Summary for both current and proposed research.
3. Attach current vitae.

---

*Faculty Signature*

**UCF College of Business Administration  
Faculty Research Summary**

**Current Research:**

<i>Project Title or Description</i>	<i>Target Publication</i>	<i>*Category</i>	<i>**Type</i>	<i>Proposed Submission Date</i>	<i>Co-author(s)</i>	<i>Status</i>

**\*Category:** A+, A, A-, B+, or B **\*\*Type:** D=Discipline-based Scholarship, P=Contributions to Practice, L=Contributions to Learning/Pedagogy

**UCF College of Business Administration  
Faculty Research Summary**

<i>Proposed Research: Project Title or Description</i>	<i>Target Publication</i>	<i>*Category</i>	<i>**Type</i>	<i>Proposed Submission Date</i>	<i>Co-author(s)</i>

**\*Category:** A+, A, A-, B+, or B **\*\*Type:** D=Discipline-based Scholarship, P=Contributions to Practice, L=Contributions to Learning/Pedagogy

**The following decision has been reached regarding the proposed three-year workload assignment.**

**Faculty Name \_\_\_\_\_ (PRINT)**

**Faculty Department or School**

**Approved as Proposed**



Workload Assignment \_\_\_\_\_ (No. of courses per academic year)

When Workload Assignment Will Begin \_\_\_\_\_ (Semester & year)

**Approved as Modified Below**

Workload Assignment \_\_\_\_\_ (No. of courses per academic year)

When Workload Assignment Will Begin \_\_\_\_\_ (Semester & year)

\_\_\_\_\_  
*Chair/Director Signature*

\_\_\_\_\_  
*Dean Signature*

\_\_\_\_\_  
*Date*

**Comments:**

**I acknowledge receiving my workload assignment**

**Faculty Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## **APPENDIX 2**

### **Department of Marketing Faculty Member Annual Goals**

#### **I. Teaching**

##### **Dimensions:**

1. Course Content/Delivery
2. Course Rigor
3. Student Engagement
4. Student Perceptions of Instruction
5. Additional Activities

##### **Goals:**

1. Course Content/Delivery
2. Course Rigor
3. Student Engagement
4. Student Perceptions of Instruction
5. Additional Activities

#### **II. Research Activity:**

#### **III. Service**

##### **Activities:**

1. Department
2. College
3. University
4. Academic Profession
5. Business Community Related
6. Professional Development (A and B tracks)

##### **Goals:**

1. Department
2. College
3. University
4. Academic Profession
5. Business Community Related
6. Professional Development (A and B tracks)

## **APPENDIX 3**

### **Department of Marketing Journal Categories**

### **A Plus (Premier) Journals**

Journal of Marketing Research (added on 01/22/1999)  
Journal of Marketing (added on 01/22/1999)  
Journal of Consumer Research (added on 01/22/1999)  
Management Science (added on 09/26/2007)  
Marketing Science (added on 01/22/1999)  
\*Journal of Consumer Psychology (added on 05/31/2012)  
\*Quantitative Marketing and Economics (added on 05/31/2012)

Note: \* While these journals are viewed as premier-level for the purpose of Annual Performance Evaluation, it is not sufficient to publish only in the two most recently added journals to meet the requirements for promotion and/or tenure in terms of the number of total premier-level publications needed.

### **A Journals**

Journal of Retailing  
Journal of the Academy of Marketing Science  
Marketing Letters  
International Journal of Research in Marketing  
Journal of Service Research  
Journal of Advertising  
Journal of Interactive Marketing  
Journal of Public Policy and Marketing  
Journal of Product Innovation Management

### **A Minus Journals**

Journal of Personal Selling and Sales Management  
Journal of Advertising Research  
European Journal of Marketing  
Journal of International Marketing  
Psychology & Marketing  
Industrial Marketing Management  
Journal of Business Research  
Service Science  
Journal of Marketing Education

### **B Journals**

Journal of Macromarketing  
International Marketing Review  
Journal of Business-to-Business Marketing  
Journal of Business and Industrial Marketing  
Journal of Consumer Affairs  
Journal of Consumer Marketing  
Journal of Current Issues and Research in Advertising  
Journal of Direct Marketing  
Journal of Global Marketing  
Journal of Health Care Marketing  
Journal of the Market Research Society (UK)  
Journal of Marketing Theory & Practice  
Journal of Pricing Management

Journal of Services Marketing  
Journal of Service Management  
Marketing Education Review  
International Journal of Advertising  
International Journal of Market Research  
Journal of Strategic Marketing  
Consumption, Markets and Culture  
Advances in Consumer Research (Full Article)  
Journal of Consumer Behavior  
Journal of Marketing Communications  
Marketing Theory  
Academy of Marketing Science Review

### **C Other Journals and Quality Conference Proceedings**

## **OUT-OF-FIELD JOURNAL CATEGORIES**

### **Supply Chain Management & Operations**

#### **A Plus (Premier) Journals**

Management Science  
Manufacturing and Service Operations Management  
Journal of Operations Management  
Operations Research  
Production & Operations Management  
Decision Sciences

#### **A/A Minus Journals**

European Journal of Operational Research  
Naval Research Logistics  
International Journal of Operations and Production Research  
International Journal of Operations and Production Management  
Journal of Supply Chain Management  
Journal of Business Logistics  
Journal of the Operations Research Society  
International Journal of Production Economics  
Transportation Science  
Transportation Research Part B: Methodological  
Operations Research Letters  
Decision Support Systems  
Annals of Operations Research

#### **B Journals**

IIE Transactions  
Omega  
Interfaces  
Supply Chain Management Review  
Journal of Purchasing and Supply Management  
International Journal of Physical Distribution and Logistics Management  
International Journal of Logistics Management  
International Journal of Logistics: Research and Applications

Transportation Research Part E: Logistics and Transportation Review  
Supply Chain Management: An International Journal

## **Management**

### **A Plus (Premier) Journals**

Academy of Management Review  
Academy of Management Journal  
Administrative Science Quarterly  
Strategic Management Journal  
Journal of Applied Psychology  
Journal of Management  
Organizational Behavior and Human Decision Processes  
Personnel Psychology  
Organization Science  
Journal of International Business Studies

### **A/A Minus Journals**

Journal of Business Venturing  
Entrepreneurship, Theory and Practice  
Journal of Product Innovation Management  
R&D  
Technovation  
Journal of Management Studies  
Business Ethics Quarterly  
Journal of Organizational Behavior  
Journal of Vocational Behavior  
Research in Organizational Behavior  
Research in Personnel and Human Resource Management  
Journal of World Business

## **Psychology**

### **A Plus (Premier) Journals**

Psychological Bulletin  
Psychological Review  
Journal of Personality and Social Psychology  
Journal of Experimental Social Psychology  
Personality and Social Psychology Bulletin  
Psychological Science  
Journal of Experimental Psychology  
Journal of Behavioral Decision Making

### **A/A Minus Journals**

Annual Review of Psychology  
Journal of Occupational and Organizational Psychology  
Quarterly Journal of Experimental Psychology  
Journal of Occupational Health Psychology  
European Journal of Social Psychology  
British Journal of Social Psychology  
British Journal of Psychology  
Ergonomics  
Personality and Individual Differences  
Human Factors: Journal of Human Factors and Ergonomics Society  
Human Performance  
International Journal of Selection and Assessment  
International Review of Industrial and Organizational Psychology  
Judgment and Decision Making  
Journal of Economic Psychology  
Journal of Applied Social Psychology  
Social Cognition  
Cognition and Emotion  
Thinking and Reasoning

### **Sociology**

#### **A Plus (Premier) Journals**

American Sociological Review  
American Journal of Sociology  
Annual Review of Sociology

#### **A/A Minus Journals**

Journal of Health and Social Behavior  
Sociological Methodology  
Sociological Methods and Research  
Social Networks  
Social Problems  
Journal of Marriage and the Family  
Demography  
Annals of Tourism Research  
Sociology of Education  
Population and Development

### **Economics**

#### **A Plus (Premier) Journals**

American Economic Review  
Econometrica  
Journal of Economic Theory  
Journal of Economics and Management Strategy  
Journal of Labor Economics  
Journal of Political Economy  
Journal of Risk and Uncertainty

Quarterly Journal of Economics  
RAND Journal of Economics  
Games and Economic Behavior

**A/A Minus Journals**

Dynamic Games and Applications  
Economics Letters  
International Journal of Industrial Organization  
Journal of Econometrics  
Journal of Economic Dynamics and Control  
Journal of Forecasting  
Journal of Industrial Economics  
Managerial and Decision Economics

## 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.

**APPENDIX 5**  
Department of Marketing  
Criteria for Promotion and Tenure

This document provides general information about promotion and tenure expectations in the Department of Marketing. Tenure-earning faculty members seeking more specific information should refer to their Cumulative Progress Evaluations (CPE). In the CPE, university employees who are responsible for making promotion and tenure recommendations annually assess the individual, cumulative performance of each tenure-earning faculty member against expectations of adequate progress toward promotion and tenure. Tenured faculty also have the option of requesting that a CPE be conducted.

Faculty members may also consult with their department chair or school director, with their mentors, or with senior faculty in the department or school, while recognizing that none of these individuals may make binding commitments about promotion and/or tenure decisions. Further information about promotion and tenure standards and procedures may be obtained from University Promotion and Tenure Guidelines (<http://facultyexcellence.ucf.edu/promotion-tenure/tenure-and-tenure-earning/>), university regulations (<http://regulations.ucf.edu/>), and the Collective Bargaining Agreement (<http://www.collectivebargaining.ucf.edu/>).

*Research Expectations*

A successful applicant for promotion and tenure must demonstrate sustained engagement in a productive research program that is likely to lead to the establishment of a national reputation for excellence in scholarship. He or she should be the primary/lead researcher in a well-defined research program and must have made a significant contribution to the advancement of knowledge in one or more fields within the marketing discipline. A successful candidate must inspire confidence that research performance after achieving promotion and tenure will equal or surpass current levels of performance. A strong record of research shall be taken as evidence of the likelihood of making continued significant professional contributions. Indicators of research performance include, for example, the quality and quantity of publications in peer-reviewed journals (although judgement of a successful research trajectory is complex and cannot be communicated as a simple number of publications), citations to the candidate's research, continuity in producing scholarship over time, the nature and extent of the candidate's contribution to co-authored research, and the presence of quality research under review and in progress.

The research record should include publications in the best peer-reviewed journals in marketing, as evidenced by impact factors, low acceptance rates, and other indicators of quality. It behooves faculty to be aware of the prestige rankings of the field's journals; rankings of marketing and out-of-discipline journals are published by the department and have been distributed to all faculty. It is advisable to include in one's promotion and tenure dossier information about the relative quality rankings for the journals where one's papers appear.

The level of performance expectations are progressive in nature for promotion from assistant to associate and for associate to professor. Thus, the criteria for promotion to professor requires that a candidate demonstrate evidence of *sustained* excellence that leads to national or international recognition in one's discipline.

*Teaching Expectations*

A successful applicant for promotion and tenure must demonstrate effective teaching performance and meaningful contribution to the teaching mission of the department or school. He or she must inspire confidence that teaching quality after achieving promotion and tenure will equal or surpass current quality. A strong record of teaching shall be taken as evidence of the likelihood of making continued instructional quality. Indicators of teaching quality include, for example, academic content and pedagogy; student, peer and self-documented measures of teaching effectiveness; student learning

outcomes; curriculum and course development; and mentoring of and professional engagement with students.

The level of teaching expectations are progressive in nature for promotion from assistant to associate and for associate to professor. Thus, the criteria for promotion to professor requires that a candidate demonstrate evidence of *sustained* excellence in teaching.

### *Service Expectations*

A successful applicant for promotion and tenure must demonstrate some participation in university service at the level of the department or school, college or university. He or she must also demonstrate some service to the profession. The successful candidate must inspire confidence that the contribution to university and professional service after achieving promotion and tenure will surpass current contributions. Indicators of service potential include, for example, serving on or contributing to the work of faculty committees, participation in seminars and faculty meetings, reviewing manuscripts for journals, and serving as discussant or session chair at professional meetings.

The level of service expectations are progressive in nature for promotion from assistant to associate and for associate to professor. Thus, the criteria for promotion to professor requires that a candidate demonstrate evidence of *sustained* excellence in service.

Approved by vote of the tenured/tenure-earning faculty of the Department of Marketing,  
March 7, 2016