

Revised Merit Policy

A.R. Sanchez, Jr. School of Business

**Revised Merit Policy for Fixed term faculty discussed and approved on November 11, 2022
College Meeting**

General Procedure

Faculty Workload Reports are to be prepared by the Division Chairs for each fall and spring semesters indicating the instructional responsibilities of each faculty along with equivalencies granted. Final approval for all teaching load reductions and semester workload assignments rests with the Dean.

- a) The Dean will inform the faculty about all merit guidelines at the beginning of the spring semester.
- b) Faculty will submit to the Division Chair the “Self-Assessment documents for Teaching, Research and Service” by February 13. The activities included in the reports are those performed in the previous calendar year.
- c) The Division Chair will evaluate the documents and the supporting materials and provide feedback to the faculty on or before March 10. The faculty member may request a meeting with the Division Chair.
- d) The chairs will provide their recommendations to the Dean by March 17.
- e) The Dean will inform the Provost about the merit evaluations by March 27.
- f) The Provost will evaluate the Chair’s and Dean’s recommendation and provide feedback to the faculty before May 15 if there are any changes. The faculty member may request a meeting with the Provost.

**SELF-ASSESSMENT OF RESEARCH ACTIVITIES FOR
FACULTY TEACHING A 2-2 LOAD**

CALENDAR YEAR

(Please only include activities that have occurred during the calendar year being reported.)

Name: Click or tap here to enter text.

<p>This year’s research goals: Click or tap here to enter text.</p>
<p>This year’s key research accomplishments: Click or tap here to enter text.</p>
<p>Next year’s research goals: Click or tap here to enter text.</p>

Instructions: In the column at left, please check the research activities you accomplished this year. In the comments column at right, please highlight significant information related to these activities. A higher level activity may also be substituted for a lower level activity. Also – where possible – if an activity is performed twice it can count twice (e.g. if a person chairs two committees each may count as an independent activity toward the required number of activities in a given category).

Check if applicable	Research Activity	Comments
	Level 5 Expectations, Exemplary:	
<input type="radio"/>	1 Tier 1	Enter comments.
	Receive a “Revise and Resubmit”/ “Acceptance” from a Elite Journal	
<input type="radio"/>	Receipt of the designation as the College/University Researcher of the Year OR	Enter comments.
<input type="radio"/>	Receipt of a competitive external research grant OR	Enter comments.
<input type="radio"/>	Publication of a peer-reviewed scholarly book/textbook	Enter comments.
	Level 4 Expectations, Highly Proficient:	
<input type="radio"/>	2 tier 2	Enter comments.
	Receive a “Revise and Resubmit” / “Acceptance” from a Top Tier Journal	
	Level 3 Expectations, Proficient:	
	TWO of the following activities:	
<input type="radio"/>	- Publication of an article in a refereed journal that is publicly available	Enter comments.
<input type="radio"/>	- Publication of proceedings from a top scholarly meeting that is publicly available	Enter comments.
<input type="radio"/>	- Publication of a chapter in a peer-reviewed scholarly book	Enter comments.

Check if applicable	Research Activity	Comments
<input type="radio"/>	- Presentation of a paper at an academic conference meeting	Enter comments.
	- Presentation of a paper at Research Presentation Series	
<input type="radio"/>	- Completion of a publicly available research report from an externally funded grant (minimum of \$10,000)	Enter comments.
<input type="radio"/>	- Other: Demonstrated significant progress toward writing a scholarly or peer reviewed book	Enter comments.
<i>Level 2 Expectations, Deficient:</i>		
<input type="radio"/>	Only evidence of a research plan and literature review	Enter comments.
<i>Level 1 Expectations, Seriously Deficient:</i>		
<input type="radio"/>	Evidence of research preparation or planning such as a research plan	Enter comments.
<i>Level 0 Expectations, Egregiously Deficient:</i>		
<input type="radio"/>	No research activity or participation in research activities	Enter comments.

Overall self-assessment of research performance this year (check one):

Exemplary 5	Highly Proficient 4	Proficient 3	Deficient 2	Seriously Deficient 1	Egregiously Deficient 0
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**SELF-ASSESSMENT OF RESEARCH ACTIVITIES FOR
FACULTY TEACHING 3-2 LOAD**

CALENDAR YEAR

(Please only include activities that have occurred during the calendar year being reported.)

Name: Click or tap here to enter text.

<p>This year’s research goals: Click or tap here to enter text.</p>
<p>This year’s key research accomplishments: Click or tap here to enter text.</p>
<p>Next year’s research goals: Click or tap here to enter text.</p>

Instructions: In the column at left, please check the research activities you accomplished this year. In the comments column at right, please highlight significant information related to these activities. A higher level activity may also be substituted for a lower level activity. Also – where possible – if an activity is performed twice it can count twice (e.g. if a person chairs two committees each may count as an independent activity toward the required number of activities in a given category).

Check if applicable	Research Activity	Comments
	<i>Level 5 Expectations, Exemplary:</i>	
<input type="radio"/>	Receive a “Revise and Resubmit” / “Acceptance” from an Top Tier Journal <i>OR</i>	
<input type="radio"/>	2 Tier 2 <i>OR</i>	Enter comments.
<input type="radio"/>	Receipt of the designation as the College/University Researcher of the Year <i>OR</i>	Enter comments.
<input type="radio"/>	Receipt of a competitive external research grant <i>OR</i>	Enter comments.
<input type="radio"/>	Publication of a peer-reviewed scholarly book/textbook	Enter comments.
	<i>Level 4 Expectations, Highly Proficient:</i>	
<input type="radio"/>	1 Tier 2	Enter comments.
	<i>Level 3 Expectations, Proficient:</i>	
	<i>Any TWO of the following activities:</i>	
<input type="radio"/>	- Publication of an article in a refereed journal that is publicly available	Enter comments.
<input type="radio"/>	- Publication of proceedings from a top scholarly meeting that is publicly available	Enter comments.
<input type="radio"/>	- Publication of a chapter in a peer-reviewed scholarly book	Enter comments.
<input type="radio"/>	- Presentation of a paper at an academic conference meeting	Enter comments.
	- Presentation of a paper at Research Presentation Series	

Check if applicable	Research Activity	Comments
<input type="radio"/>	- Completion of a publicly available research report from an externally funded grant (minimum of \$10,000)	Enter comments.
<input type="radio"/>	- Other activity in consultation with Chair and Dean	Enter comments.
<input type="radio"/>	- Other: Demonstrated significant progress toward writing a scholarly or peer reviewed book	Enter comments.
<i>Level 2 Expectations, Deficient:</i>		
<input type="radio"/>	Only evidence of a research plan and literature review	Enter comments.
<i>Level 1 Expectations, Seriously Deficient:</i>		
<input type="radio"/>	Evidence of research preparation or planning such as a research plan	Enter comments.
<i>Level 0 Expectations, Egregiously Deficient:</i>		
<input type="radio"/>	No research activity or participation in research activities	Enter comments.

Overall self-assessment of research performance this year (check one):

Exemplary 5	Highly Proficient 4	Proficient 3	Deficient 2	Seriously Deficient 1	Egregiously Deficient 0
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**SELF-ASSESSMENT OF RESEARCH ACTIVITIES FOR
FACULTY TEACHING A 3-3 LOAD**

CALENDAR YEAR

(Please only include activities that have occurred during the calendar year being reported.)

Name: Click or tap here to enter text.

<p>This year’s research goals: Click or tap here to enter text.</p>
<p>This year’s key research accomplishments: Click or tap here to enter text.</p>
<p>Next year’s research goals: Click or tap here to enter text.</p>

Instructions: In the column at left, please check the research activities you accomplished this year. In the comments column at right, please highlight significant information related to these activities. A higher level activity may also be substituted for a lower level activity. Also – where possible – if an activity is performed twice it can count twice (e.g. if a person chairs two committees each may count as an independent activity toward the required number of activities in a given category).

Check if applicable	Research Activity	Comments
	Level 5 Expectations, Exemplary:	
<input type="radio"/>	Receive a “Revise and Resubmit” / “Acceptance” from an Top Tier or Elite Journal OR	
<input type="radio"/>	1 Tier 2 OR	
<input type="radio"/>	Receipt of a competitive external research grant OR	
<input type="radio"/>	Publication of a peer-reviewed scholarly book/textbook	
	Level 4 Expectations, Highly Proficient:	
<input type="radio"/>	2 conference presentations	
	Level 3 Expectations, Proficient:	
	TWO of the following activities:	
<input type="radio"/>	- Publication of an article in a non-tiered refereed journal that is publicly available	
<input type="radio"/>	- Publication of a chapter in a peer-reviewed scholarly book	
<input type="radio"/>	- Presentation of a paper at an academic conference meeting	
<input type="radio"/>	- Presentation of a paper at Research Presentation Series	
<input type="radio"/>	- Completion of a publicly available research report from an externally funded grant (minimum of \$10,000)	
<input type="radio"/>	- Other activity in consultation with Chair and Dean	

Check if applicable	Research Activity	Comments
<input type="radio"/>	- Other: Demonstrated significant progress toward writing a scholarly or peer reviewed book	Enter comments.
	<i>Level 2 Expectations, Deficient:</i>	
<input type="radio"/>	Only evidence of a research plan and literature review	Enter comments.
	<i>Level 1 Expectations, Seriously Deficient:</i>	
<input type="radio"/>	Evidence of research preparation or planning such as a research plan	Enter comments.
	<i>Level 0 Expectations, Egregiously Deficient:</i>	
<input type="radio"/>	No research activity or participation in research activities	Enter comments.

Overall self-assessment of research performance this year (check one):

Exemplary 5	Highly Proficient 4	Proficient 3	Deficient 2	Seriously Deficient 1	Egregiously Deficient 0
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SELF-ASSESSMENT OF TEACHING ACTIVITIES

CALENDAR YEAR

(Please only include activities that have occurred during the calendar year being reported.)

Name: Click or tap here to enter text.

This year's teaching goals: Click or tap here to enter text.
This year's key teaching accomplishments: Click or tap here to enter text.
Next year's teaching goals: Click or tap here to enter text.

Instructions: In the column at left, please check the teaching activities you accomplished this year. In the comments column at right, please highlight significant information related to these activities. A higher level activity may also be substituted for a lower level activity. Also – where possible – if an activity is performed twice it can count twice (e.g. if a person chairs two committees each may count as an independent activity toward the required number of activities in a given category).

Check if applicable	Teaching Activity	Comments
	Level 5 Expectations, Exemplary:	
<input type="radio"/>	Average student evaluation ratings in all courses taught in fall and spring semesters on first four questions equal or above 4.5 points OR	Enter comments.
<input type="radio"/>	Average student evaluation ratings in all courses taught in fall and spring semesters on first four questions equal or above 4.0 points AND	Enter comments.
	At least TWO of the following:	
<input type="radio"/>	- Evidence of updating course material, assignments or activities (undergraduate/masters/Ph.D. levels) in at least one class	Enter comments.
<input type="radio"/>	- Teach a large undergraduate class (more than 40 students)	Enter comments.
<input type="radio"/>	- Teach a large graduate class (more than 25 students)	Enter comments.
<input type="radio"/>	- Development of new audio-visual aids or learning aids for students	Enter comments.
<input type="radio"/>	- Teaching a new class preparation	Enter comments.
<input type="radio"/>	- Complete a teaching training program	Enter comments.
<input type="radio"/>	- Teach a course the instructor has not taught in the prior academic year	Enter comments.
<input type="radio"/>	- Teaching a writing intensive course (WIN)	Enter comments.
<input type="radio"/>	- Developing/teaching an online course	Enter comments.
<input type="radio"/>	- Development of at least one new case for classroom use	Enter comments.

Check if applicable	Teaching Activity	Comments
○	- Supervision of student projects (undergraduate, masters, honors students)	Enter comments.
○	- Annual teaching award from student organizations	Enter comments.
○	- Serves as Faculty Advisor to students in the faculty member's discipline	Enter comments.
○	- Evidence of active teaching mentoring	Enter comments.
○	- Teaching recognition by peers (e.g., Division, College, University)	Enter comments.
○	- Teaching awards from professional or academic organizations	Enter comments.
○	- Evidence of use of peer reviews by external parties (e.g., teaching center) to improve teaching	Enter comments.
○	- Evidence of use of peer reviews by Division colleagues to improve teaching	Enter comments.
○	- Teaching a course in a closely related field	Enter comments.
○	- Other activity in consultation with Division Chair and Dean	Enter comments.
<i>Level 4 Expectations, Highly Proficient:</i>		
○	Average student evaluation ratings in all courses taught in fall and spring semesters on first four questions equal or above 3.75 points <i>OR</i>	Enter comments.
○	Average student evaluation ratings in all courses taught in fall and spring semesters on first four questions equal or above 3.5 points <i>AND</i>	Enter comments.
<i>At least ONE of the following:</i>		
○	- Teach a large graduate class (more than 25 students)	Enter comments.
○	- Development of new audio-visual aids or learning aids for students	Enter comments.
○	- Teaching a new class preparation	Enter comments.
○	- Complete a teaching training program	Enter comments.
○	- Teach a course the instructor has not taught in the prior academic year	Enter comments.
○	- Teaching a writing intensive course (WIN)	Enter comments.
○	- Developing/teaching an online course	Enter comments.
○	- Development of at least one new case for classroom use	Enter comments.
○	- Supervision of student projects (undergraduate, masters, honors students)	Enter comments.
○	- Annual teaching award from student organizations	Enter comments.
○	- Serves as Faculty Advisor to students in the faculty member's discipline	Enter comments.
○	- Evidence of active teaching mentoring	Enter comments.
○	- Teaching recognition by peers (e.g., Division, College, University)	Enter comments.

Check if applicable	Teaching Activity	Comments
<input type="radio"/>	- Teaching awards from professional or academic organizations	Enter comments.
<input type="radio"/>	- Evidence of use of peer reviews by external parties (e.g., teaching center) to improve teaching	Enter comments.
<input type="radio"/>	- Evidence of use of peer reviews by Division colleagues to improve teaching	Enter comments.
<input type="radio"/>	- Teaching a course in a closely related field	Enter comments.
<input type="radio"/>	- Other activity in consultation with Division Chair and Dean	Enter comments.
<i>Level 3 Expectations, Proficient:</i>		
<input type="radio"/>	Average student evaluation ratings in all courses taught in fall and spring semesters on first four questions equal or above 3.2 points	Enter comments.
<i>Level 2 Expectations, Deficient:</i>		
<input type="radio"/>	Unsatisfactory performance in classroom instruction when the average student evaluations are below 2.5 and it requires remedial measures to correct	Enter comments.
<i>Level 1 Expectations, Seriously Deficient:</i>		
<input type="radio"/>	Unsatisfactory performance in classroom instruction when the average student evaluations are below 2.0 and it requires remedial measures to correct	Enter comments.
<i>Level 0 Expectations, Egregiously Deficient:</i>		
<input type="radio"/>	Unsatisfactory performance in classroom instruction when the average student evaluations are below 1.5 and it requires remedial measures to correct.	Enter comments.

Overall self-assessment of teaching performance this year (check one):

Exemplary 5	Highly Proficient 4	Proficient 3	Deficient 2	Seriously Deficient 1	Egregiously Deficient 0
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SELF-ASSESSMENT OF SERVICE ACTIVITIES

CALENDAR YEAR

(Please only include activities that have occurred during the calendar year being reported.)

Name: Click or tap here to enter text.

This year's service goals: Click or tap here to enter text.
This year's key service accomplishments: Click or tap here to enter text.
Next year's service goals: Click or tap here to enter text.

Instructions: In the column at left, please check the service activities you accomplished this year. In the comments column at right, please highlight significant information related to these activities. A higher level activity may also be substituted for a lower level activity. Also – where possible – if an activity is performed twice it can count twice (e.g. if a person chairs two committees each may count as an independent activity toward the required number of activities in a given category).

Service Description	Service Level	Chair	Points
		<input type="radio"/>	
		<input type="radio"/>	
		<input type="radio"/>	
		<input type="radio"/>	
		<input type="radio"/>	
		<input type="radio"/>	
		<input type="radio"/>	
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		<input type="radio"/>	
		<input type="radio"/>	
		<input type="radio"/>	
		<input type="radio"/>	
		<input type="radio"/>	
		<input type="radio"/>	
Total			

Overall self-assessment of service performance this year (check one):

Exemplary 5	Highly Proficient 4	Proficient 3	Deficient 2	Seriously Deficient 1	Egregiously Deficient 0
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

SELF-ASSESSMENT OF SERVICE AWARDS
POINT VALUE GUIDE – ALL FACULY INCLUDING FIXED TERM FACULTY

Service Level: University			
#	Committee	Point Value	
		If Chair	If Member
1	Technology Advisory		3
2	Distance Education		3
3	University Curriculum		3
4	University Grievance		3
5	University Library		3
6	University Risk Management		3
7	University Honor council		3
8	Faculty Development Leave		3
9	University Promotion and Tenure		3
10	Graduate Council		3
11	Faculty Senate		3

Service Level: College			
#	Committee	Point Value	
		If Chair	If Member
12	Dean's Administrative Council	5	3
13	AACSB Steering Committee	5	3
14	Undergraduate Curriculum & Assessment	6	4
15	Masters Curriculum and Assessment	6	4
16	Master Admissions	5	3
17	PHD Curriculum and Assessment	6	4
18	SACS Assessment	6	4
19	Research Committee	5	3
20	College Promotion and Tenure		3
21	Teaching and learning	5	3
22	Web Design	5	3
23	Western Hemispheric Trade Conference	5	3
24	Task Force for Spanish MBA	5	3
25	Faculty Student Advisors		3
26	Faculty Mentors		3
27	Banking Academy Committee		3
28	Economics Tenure line Search Committee	5	3
29	Management Tenure line Search Committee	5	3

30	Marketing Tenure line Search Committee	5	3
31	Finance Tenure line Search Committee	5	3

**SELF-ASSESSMENT OF SERVICE ACTIVITIES
GUIDE**

Service Level: Division			
#	Committee	Point Value	
		If Chair	If Member
32	Accounting Data Analytics (DIBFS)	5	3
33	Core curriculums Economics (DIBFS)	5	3
34	Graduate Certificate Data Analytics (DIBTS)	5	3
35	PHD MIS/Data Analytics (DIBTS)	5	3
36	Field of Study and computer literacy (DIBTS)	5	3

Service Level: Other			
#	Committee	Point Value	
		If Chair	If Member
37	Research Presentation Series	5	
38	Represent univ/college in prof. assoc.		3
39	Evidence of mentoring student/faculty		3
40	Serving as editor of academic journal	5	
41	Member journal board (editor, associate)		3
42	Advisor student organization		3
43	Fundraising activities		3
44	Discussant of papers in conferences		3
45	Track chair in a conference	5	
46	Serving on public commissions		3
47	Serving on advisory boards		3
49	Community activities (5 hours)		1
50	University Community activities (5 hours)		1
51	SACS & AACSB assessment in classes		4
52	Referee paper for academic journal		1

SELF-ASSESSMENT OF SERVICE ACTIVITIES-FIXED TERM FACULTY ONLY

Service Level: Fixed Term Faculty Only		
#	Activities	Amended PROVISIONAL Point Value
53	Publication of a refereed journal article	5
54	Publication of a refereed magazine article	4
55	Publication of a business case in a referred journal	3
56	Publication of a book	5
57	Publication of a book chapter	3
58	Publication of an article in a professional journal	3
59	Presentation of a paper in an international, national or regional conference	3
60	Completion of a publicly available research report from an externally funded grant (minimum of \$10,000)	5
61	Significant participation in business professional associations	3
62	Relevant, active service on board of directors	3
63	Consulting activities that are material in terms of time and substance	3
64	Faculty internships	3
65	Development and presentation of executive education programs	4
66	Sustained professional work supporting qualified status	2
67	Documented continuing professional education experiences	2
68	Participation in professional events that focus on the practice of business, management, and related issues	1
69	Participation in other activities that place faculty in direct contact with business or other organizational leaders	1
70	Professional certification that is relevant to the faculty member's instructional field	3
71	Membership on business community boards	3
72	Activity in accreditation seminars and conferences	2
73	Validation of PA status through leadership positions, participating in recognized societies and associations, research awards, academic fellow status and invited presentations	2

**SELF-ASSESSMENT OF SERVICE ACTIVITIES TENURE and TENURE TRACK
FACULTY ONLY
GUIDE**

**Service Level: Tenure and Tenure Track Faculty
Activities**

#	Committee	Point Value	
		If Chair	If Member
74	PHD Dissertation Committee	5	3
75	PHD Dissertation Committee	5	3
76	PHD Dissertation Committee	5	3
77	PHD Dissertation Committee	5	3
78	PHD Dissertation Committee	5	3
79	Promotion and Tenure (DIBFS)	5	3
80	Promotion and Tenure (DIBTS)	5	3
81	Promotion and Tenure (college)	5	3

Overall Self-Assessment Level

Merit Level	Minimum Point Required	
	Tenure / Tenure Track Faculty	Non Tenure Track Faculty
3	15	12
4	17	14
5	19	16