



FACULTY AFFAIRS AND RECORDS

Official Department Standards for Lecturer Faculty for the Department of Marketing

Approved by Dr. Carolyn Thomas, Provost and Vice President for Academic Affairs, on 2/1/2022 for implementation in the Fall 2022 semester

[Verified and posted online at www.fullerton.edu/far/dsl/mktg2022lecturer.pdf](http://www.fullerton.edu/far/dsl/mktg2022lecturer.pdf)

According to Article 15.3 of the Collective Bargaining Agreement: Evaluation criteria and procedures shall be made available to the faculty unit employee no later than 14 days after the first day of instruction of the academic term. Evaluation criteria and procedures shall be made available to the evaluation committee and the academic administrators prior to the commencement of the evaluation process. Once the evaluation process has begun, there shall be no changes in criteria and procedures used to evaluate the faculty unit employee during the evaluation process.



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Marketing Department Standards for Lecturer Faculty

Introduction

The objective of this document is to establish guidelines that facilitate the evaluation of lecturers in the Department of Marketing. The standards of performance established in this document are designed to allow evaluators an opportunity to assess a lecturer's continuing contributions to the University and its students. It is the responsibility of the candidate to develop a record of performance that reflects important contributions to the Department.

The Marketing Department is unique among Departments in the College of Business and Economics in that it houses the Business Communication Program, resulting in a higher number of Lecturers than would otherwise be the case, with implications for the efficiency of the evaluation process.

These Marketing Department Standards for Lecturers seek to address this. Although the Business Communication Program is and remains a program of courses with goals distinct from those of the six academic Departments within the College of Business and Economics, faculty who teach in the Business Communication Program are Marketing Department faculty. One set of standards, laid out here, apply to all Marketing Department faculty and courses, including any and all Programs and courses of study managed by or housed within the Marketing Department and faculty who teach course(s) in those program(s).

These guidelines are prepared in accordance with the requirements of the University Policy Statement "Evaluation of Lecturers," UPS 210.070. Faculty need to be aware that the entire text of UPS 210.070 latest edition is hereby incorporated by reference into this document. All lecturers are required to read the most recent version of UPS 210.070 in conjunction with this document.

The Department Personnel Committee (DPC) of the Marketing Department has prepared the following document to assist lecturers in preparing their Working Personnel Action File (WPAF) described in UPS 210.070. These guidelines indicate the materials that must be included in WPAF. Since personnel decisions must be based solely on evidence contained in the WPAF, the latter must contain all relevant evidence in accordance with UPS 210.070. The Department Personnel Committee (DPC) evaluates only the evidence contained in the WPAF. The WPAF will serve the DPC and the Department in assuring the impartial application of uniform standards in the lecturer evaluation process.

Definitions

Lecturer

Lecturers are defined by the University as Temporary Employees. They are hired on a temporary basis on 1-year or 3-year contracts. See below for schedule and definitions of periodic reviews necessary to renew or initiate 1-year or 3-year contracts. There are different categories of temporary employees (lecturers) hired:

1. Full-time lecturers. These temporary employees have a five-course teaching load, but may be eligible to perform service at the discretion of the Dean to reduce that to a four-course load. Full-time lecturers eligible for service are evaluated for service per Section 8 in the Guidelines for Each Evaluation Item below (when they have performed service during the Period of Review).
2. Full-time 1.0 and part-time lecturers. These temporary employees teach five courses (full-time 1.0) or fewer courses (part-time). There is no service option for these lecturers, and thus there is no service component to the evaluations of these lecturers.

Unless otherwise noted:

1. The three categories noted above are the only means of categorization of lecturers
2. All standards herein apply to all lecturer categories
3. All standards herein apply to all lecturers irrespective of the course(s) they teach for the Department (i.e. BUAD or MKTG)

Department Personnel Committee (DPC)

The DPC is elected by the Department in accordance with UPS 210.000. In the Department of Marketing, the DPC serves the designated role of the DPC, as well as that of the Department Peer Review Committee (DPRC). Untenured faculty shall not serve on the Department Personnel Committee. A faculty member who is on any type of leave during the academic year may not serve on the DPC. The department may make a request to the President that Faculty Early Retirement Program (FERP) participants who are employed in both fall and spring semesters of the same academic year be made eligible to run for election to the DPC. However, the committee cannot be comprised solely of FERP faculty. Other CSUF or CSU policies may impact the ability of individuals to participate in the personnel process (e.g. CSU Nepotism Policy).

Direct Observation Committee (DOC)

The DOC shall consist of a minimum of three (3) faculty elected from among tenured and tenure-track faculty for the purpose of conducting direct observation of teaching by lecturers in accordance with UPS 210.080. Faculty may serve concurrently on the DOC and the DPC. Service is for a period of one year, with no limit on consecutive or total appointments.

Observations shall be conducted via in-person classroom visit(s), direct attendance to online class meeting(s), or direct review of prerecorded asynchronous lecture(s) (only when no synchronous in-person or online class meetings are conducted). Observations shall occur once during the first year of initial appointment, and then once prior to submission of the WPAF for the Six Year Comprehensive Evaluation if an evaluation of Unsatisfactory or Needs Improvement was received on any of Evaluation Items 1, 2, 4, or 5 in the preceding Period of Evaluation. Additional direct observations may be conducted prior to subsequent Three Year Periodic Evaluations if a faculty member requests such an observation, or If a faculty member receives teaching evaluations of Unsatisfactory or Needs Improvement.

Periodic Evaluations

1. Types of Periodic Evaluations
 - a. Annual Periodic Evaluation: Lecturers not undergoing a six-year or a three-year evaluation will undergo an annual periodic evaluation, beginning with their second semester of employment. Once appointed to a 3-year contract evaluations take place per below.
 - b. Three Year Periodic Evaluation: A lecturer holding a three-year appointment will undergo a three-year periodic evaluation in the third year of appointment.
 - c. Six Year Comprehensive Evaluation: Lecturers who are in their sixth consecutive year of service will undergo a comprehensive evaluation in that year to determine eligibility for an initial three-year appointment. This evaluation shall involve a cumulative review of the lecturer's performance for the entire six-year service period.
2. Frequency of Evaluation
 - a. For lecturers in appointments with one semester only, evaluation of the first semester is at the discretion of the Dean in consultation with the Department Chair. Newly hired lecturers shall be evaluated during the second one-semester appointment (whether consecutive or not).
 - b. Lecturers undergo annual periodic evaluation in their first five years of employment; those in three-year appointments undergo periodic evaluation in the third year of the appointment.
 - c. Lecturers who have six consecutive years of service undergo an evaluation in the sixth year to determine eligibility for an initial three-year appointment.
 - d. Lecturers may be evaluated more frequently at their request or at the request of the Department Chair or the Dean.
3. Period of Evaluation
 - a. Annual Evaluation: The period of review shall be defined as the time period between the start of the semester in which the last review file was submitted and the current file's due date. For a first evaluation, the period of review shall be defined as the time period between the date of the initial appointment and the current file's due date.

- b. Three Year Periodic Evaluation: The period of review shall be defined as the time period between the start of the beginning of the three-year appointment and the file's due date.
 - c. Six Year Comprehensive Evaluation: The period of review shall be defined as the time period between the start of the beginning of the six-year service as a lecturer, and the file's due date.
4. Levels of Evaluation
- a. Annual Evaluations: Lecturers undergoing annual periodic evaluations shall be evaluated by at least two levels of review: the DPC and the Department Chair. Part-time lecturers may be reviewed by the Dean at the Dean's discretion. Evaluations resulting in less than "Satisfactory" rating by the DPC or the Department Chair shall be forwarded to the Dean. Full-time or full-time 1.0 Lecturers undergoing annual periodic evaluations shall be evaluated by the DPC, the Department Chair, and the Dean.
 - b. Three-Year Periodic Evaluations and Six-Year Comprehensive Evaluations: All lecturers undergoing a three-year periodic evaluation or a six-year comprehensive evaluation shall be evaluated by the DPC, the Department Chair, and the Dean.

Range Elevation

The Range Elevation evaluation is only carried out when the lecturer is eligible for and requests a range elevation.

1. Range Elevation Period of Evaluation
 - a. Evaluation for range elevation considerations shall involve an evaluation of the lecturer's performance during the entire time period covering their current range. If the range is more than five years, the evaluation should pay particular attention to the most recent five years. This period of evaluation shall be defined as the time period between the start of the academic year five years prior to the current academic year and the date when the file is submitted.
 - b. If a lecturer wishes to include in the WPAF evidence of performance outside this five-year period, they should organize the evidence to include:
 - i. Only evidence of performance relevant to their current range.
 - ii. Material that is relevant to performance in the most recent five-year period.
 - iii. Material that provides evidence of performance that cannot otherwise be documented within the most recent five-year period, but that meets (i) above.
2. Range Elevation Evaluation Process
 - a. Lecturers under consideration for range elevation shall be evaluated by the DPC, the Department Chair, and the Dean.
 - b. Lecturers who are eligible and apply for range elevation undergo an evaluation that results in a determination and recommendation for or against range elevation at each level of review.
3. The Provost shall make the final determination on range elevations.

Evaluation Ratings

UPS 210.070 and CBE AACSB Faculty Status Policy have set forth the categories upon which a faculty member is to be evaluated. These are (1) teaching, (2) AACSB faculty status, and (3) professional, university and community service (for full-time lecturers only). This document specifies the kinds of evidence the DPC must have in order to make a judgment about the faculty member's performance in these categories and describes the standards that are applied and the methods used to evaluate that evidence.

Four rating categories specify the overall evaluation of lecturers:

Exceeds Expectations – Performance in assigned duties is better than satisfactory

Satisfactory – Performance meets expectations

Needs Improvement – Performance does not meet expectations

Unsatisfactory – Performance is seriously deficient

Note that an evaluation that finds a lecturer's performance to be "Satisfactory" or better is not an offer of work, nor is it a reappointment; the appropriate administrator responsible for assigning work will take the evaluations from prior levels of review, as well as other information.

If a lecturer's performance is evaluated as "Needs Improvement" the evaluation should specify those areas in which improvement is needed and should be addressed during the next appointment period, if reappointed. The DPC or Department Chair or Dean should make recommendations for professional development activities in their evaluations. Subsequent evaluations of "Needs Improvement" shall normally lead to a decision not to reappoint.

An evaluation of "Unsatisfactory" shall typically result in a decision not to reappoint.

Scope of Evaluation

The Department of Marketing and the relevant committees noted above conduct evaluations for all lecturers who have taught a Marketing (MKTG) or Business Communication (BUAD 130, 201, 301, or 501(a)) course during the relevant period of evaluation. If a Lecturer has during that time also taught a course in another department (within or outside the CBE) they will undergo separate review for those assignments; and such assignments are not covered by the guidelines specified herein.

Evaluation Criteria

UPS 210.070 specifies evaluation criteria when reviewing the performance of lecturers. The principal evaluation criteria for lecturers exclusively assigned to teaching are teaching performance and disciplinary and pedagogical currency. Examples and sources of evidence in the tables below are for illustrative purposes and are not comprehensive lists. Criteria for educational performance includes the first six criteria below. The seventh criterion only applies to full-time lecturers who engage in service for course release, per eligibility.

Criteria
1. Compliance with University, College, and Department policies governing instructional duties as outlined in faculty handbooks and University Policy Statements. Examples: Gives final exam on date/time assigned by the University; maintains office hours.
2. Establishment of a course environment conducive to learning. Examples: Provides means for students to contribute to course learning by encouraging inquiry; provides coherent structure for course meetings which is understood by the students.
3. Effective implementation of a course syllabus clearly linking learning goals to methods of assessment and student outcomes. Examples: Learning goals made clear to students at the start of course; assessments and grading practices are clearly related to learning goals.
4. Effective use of a variety of instructional methods. Examples: Instructional methods are appropriate to course goals; Technology (e.g., response clickers, blogs, discussion boards) is used to enhance participation where appropriate.
5. Establishment of appropriate academic standards and holding students accountable for the standards of the discipline of study, and adhering to Department course GPA guidelines in the application of those standards. Examples: Academic integrity is stressed in the course; effectiveness, fairness and timeliness of testing, other assessments and grading procedures are evident.
6. Pedagogical currency and disciplinary currency as related to teaching. Examples: Course content emphasizes students' acquisition of knowledge and skills that are currently valued in the discipline. Pedagogical methods are current in relation to the discipline and subject matter; continuing professional engagement in the discipline and/or professional development relevant to teaching assignment.
7. Service (full-time lecturers only). Examples: Service on Department, College or University committees; community outreach in the service of the Department, College or University; student advising or mentoring.

Lecturers receive an overall rating based on the specific evaluation items listed in the table below. The scores on each evaluation item are based on extent of compliance with the UPS 210.070 criteria. The table below links each evaluation item with its corresponding UPS criteria and sources of evidence used to assess lecturers. The Appendix contains a sample DPC Lecturer Evaluation Form that covers these evaluation items. This evaluation form is used to evaluate all lecturers. Part-time and full-time 1.0 lecturers are evaluated on teaching only. Full-time lecturers who are eligible to perform service are evaluated on teaching and service.

	Evaluation Item	UPS 210.070 Criteria	Source of Evidence
1	Student Evaluations (Statistical summaries)	2	SOQs
2	Student Evaluations (Open Ended Comments)	2, 4, 6	SOQs

3	Class Grade Point Average	5	Narrative summary, grade distribution reports
4	Course Design (Stated objectives in course syllabus, relevancy of assignments, supplemental course materials/readings, use of technology)	1, 3, 4, 5, 6	Syllabus, narrative summary, examples of course projects and student work
5	Pedagogical Currency and Disciplinary Currency	6	CV, narrative summary, SOQs, Direct Observation
6	AACSB Qualification (Exceptions apply; see below)	1	CV, FQ form, Digital Measures Report and supporting documents
7	Direct Observation	1, 2, 3, 4, 6	In-person classroom visit, direct online class attendance, or direct review of prerecorded asynchronous lecture
8	Service (for eligible full-time lecturers who choose the service option only)	7	CV, Digital Measures Report and supporting documents

Guidelines for Each Evaluation Item

1. Student Evaluations (Statistical Summary)	
Exceeds Expectations	Satisfactory
Mean SOQ scores fall within the following range: 3.41-4.0	Mean SOQ scores fall within the following range: 3.00-3.40
Needs Improvement	Unsatisfactory
Mean SOQ scores fall within the following range: 2.61-2.99	Mean SOQ scores are at or below 2.6.

Although SOQs may reveal valuable trends in student perceptions, they should not be viewed in isolation from other indicators listed above. Moreover, both qualitative and quantitative data gathered on SOQs can be impacted by racial, gender, and linguistic bias, suggesting that individual students' comments – as well as trends within SOQs themselves – must be interpreted cautiously and contextually. Any single item on the SOQ – or the entire form, by itself and in isolation from other information – does not provide sufficient evidence of teaching effectiveness. Overall, patterns of objective responses and written comments obtained in different courses over several semesters shall be considered more informative than isolated, individual comments.

Review of student evaluations (statistical summary) also may take into account department average ratings, variability of ratings, trends in ratings over time, class size, inclusion in honors program, online versus face-to-face format, and ratings on individual criteria (e.g., ability to communicate, overall teaching effectiveness, knowledge of course content, etc.). They will explicitly take into account Class Grade Point Average (see Item 3 below). The above evaluations apply only to courses that adhere to established GPA guidelines (see Item 3 below); the evaluation category may be lowered by one or two categories if the SOQ rating applies to a

course with a GPA above the established range; especially when multiple courses taught by a Lecturer are above prescribed GPA ranges.

2. Student Evaluations (Open Ended Comments)	
Exceeds Expectations	Satisfactory
Near universal positive statements. Student comments demonstrate faculty member developed an exceptional environment conducive to learning and used varied instructional methods.	Significant majority of positive vs. negative statements. Student comments suggest faculty member developed a satisfactory environment conducive to learning and used somewhat varied instructional methods.
Needs Improvement	Unsatisfactory
Modest majority of positive or negative statements. Student comments demonstrate faculty member developed a limited environment for learning, with limited variation of instructional methods, and limited use of timely or relevant topics.	Preponderance of negative statements. Student comments indicate faculty member failed to develop an environment conducive to learning, did not use varied instructional methods, or did not teach timely or relevant topics.

Review of student evaluations (open-ended comments) also may take into account consistency in patterns of positive or negative responses, and trends in responses over time.

3. Class Grade Point Average (GPA)	
Exceeds Expectations	Satisfactory
All class GPAs fall within range specified in table below, tend to converge towards midpoint of range, and are not clustered at either endpoint of range without compelling justification (e.g., honors class).	All class GPAs fall within range specified in table below, but tend to deviate from midpoint of range.
Needs Improvement	Unsatisfactory
Class GPAs are not consistently within range specified in table below (< 50% of courses taught).	Class GPAs consistently fall outside of range specified in table below (>50% of courses taught).

Review of class GPA takes into account the distribution of grades. The DPC will explicitly note that grade distributions that consistently fall outside the prescribed ranges render SOQ scores less meaningful. It is expected that course GPAs that fall within the specified ranges do so via a normal distribution of grades (i.e. GPAs are not consistently brought into range via a few very high/low scores that skew the mean, nor are they achieved via all students receiving the same grade within the specified range). Application of this standard may be relaxed for unusually small courses (<15 students) or other extenuating circumstances.

Course Level (BUAD OR MKTG)	Low	High
200	2.2	2.6
300	2.5	2.9
BUAD301/MKTG351	2.3	2.7
400	2.5	2.9
500	3.3	3.7

For the period of evaluation, all SOQs and class GPAs should be entered in the Summary SOQ and GPA form.

4. Course Design	
Exceeds Expectations	Satisfactory
<p>Syllabus and required elements are complete. Modules or sections have extensive details clarifying objectives and providing content. Student learning objectives are clearly defined and linked to assessment methods and student outcomes. Stated objectives are implemented in the course.</p> <p>The course contains a variety of well-defined assignments linked to clearly specified learning objectives and focused on topics relevant to the discipline and/or current industry practice.</p> <p>Textbook, materials and/or supplemental readings are innovative and relevant to the discipline and/or current industry practice.</p>	<p>Syllabus is complete and all required elements are present. Student learning objectives are clearly defined. Stated objectives are implemented in the course.</p> <p>The course contains assignments linked to course objectives and reasonably focused on topics relevant to the discipline and/or current industry practice.</p> <p>Textbook, materials and/or supplemental readings are current and relevant to the discipline and/or current industry practice.</p>
Needs Improvement	Unsatisfactory
<p>Syllabus is provided, but details are minimal. Required syllabus elements are missing, including a clear layout of student learning objectives and methods of assessment. Failure to implement some stated objectives.</p> <p>The course lacks rigor: it contains minimal assignments/activities beyond exams, which may appear minimally connected to relevant topics and course objectives.</p> <p>Textbook, readings, and/or other materials mostly dated, but with some current materials.</p> <p>Cancellation of scheduled classes, activities, or assignments beyond exceptional circumstances.</p>	<p>Syllabus is absent or when provided is deficient in important details. Student learning objectives are not well defined. Missing assessment tools and expected student outcomes. Failure to implement some stated objectives.</p> <p>Course assessment is based solely or predominantly on exams, or assignments that lack rigor or relevance. Little or no evidence of other evaluation methods. General lack of assignments or exercises intended to reinforce student learning, or failure to implement such assignments and/or exams in the course.</p> <p>Out of date textbook or other materials. Content does not satisfactorily match the course description.</p> <p>Multiple cancellations of scheduled classes, activities, or assignments.</p>

5. Maintenance of Pedagogical and Disciplinary Currency (see requirements and details following 6. AACSB Qualified table below)	
Exceeds Expectations	Satisfactory
Demonstrated evidence of multiple formal training and/or other formal activities focused on pedagogy development and professional expertise.	Evidence of some formal training or other formal activities focused on pedagogy development and/or professional expertise.
Needs Improvement	Unsatisfactory
Some evidence of informal efforts focused on pedagogy development or professional expertise.	No evidence (or failure to provide evidence) of training or other activities focused on pedagogy development or professional expertise.

6. AACSB Qualified (Exceptions apply; see below)	
Yes: Scholarly Academic	Yes: Practice Academic
Research active with a doctoral degree or doctoral candidacy earned in last 5 years.	Possesses doctoral degree with relevant consulting experience.
Yes: Instructional Academic	Yes: Instructional Practitioner
Possesses graduate degree and is research active.	Possesses graduate degree with relevant work and/or consulting and/or professional experience.
No	
None of the above	

To indicate Pedagogical and Disciplinary Currency and/or AACSB Qualification all Lecturers must:

- Enter relevant activities via Digital Measures
- Run a Faculty Qualification Table Report (sample in Appendix)
- Use the Report to complete the Pedagogical and Disciplinary Currency Form (see Appendix)
- Upload both forms to their WPAF portfolio
- Upload supporting documentation to Interfolio (see below)

Instructions for these steps can be found on the Pedagogical and Disciplinary Currency Form. In addition, Lecturers should note the more significant of these items in their Teaching Narrative. Documentation should be provided for any formal training, presentations, consulting work or other activities used to demonstrate Pedagogical and Disciplinary Currency or AACSB Qualification.

NB: Lecturers who exclusively teach Business Communication courses (BUAD 130, 201, 301, or 501(a)) are not required by the CBE to be AACSB Qualified for the purposes of evaluation. Thus, such lecturers may indicate this on their Pedagogical and Disciplinary Currency Form and determination of AACSB Qualification will be omitted from their evaluation. However, **Lecturers should note** that the teaching of any Marketing course(s) outside the Business Communication Program at any point during the Evaluation Period will trigger the requirement for AACSB Qualification for the Evaluation Period. Lecturers should also be aware that teaching

assignments outside the Marketing Dept. (within or outside the CBE; e.g. Management, Psychology, English, etc.) may also trigger AACSB (or other accreditation) qualification requirements, as specified by the standards of those departments respectively, or UPS requirements.

7. Direct Observation	
Exceeds Expectations	Satisfactory
Has clearly established a learning environment conducive to learning; has clearly organized the course, lesson, and learning materials, which are widely accessible; uses varied approaches to engage students of different learning styles; and brings innovative pedagogy and relevant information to the lesson.	Has reasonably established a learning environment conducive to learning; course, lesson, and learning materials are reasonably organized and accessible; adjusts approach for students of different learning styles; and brings current pedagogy and relevant information to the lesson.
Needs Improvement	Unsatisfactory
Is somewhat deficient in creating an enriching learning environment, in course organization, in making material accessible and engaging to all students, and/or uses dated pedagogy or irrelevant/dated information.	Has not created a learning environment conducive to learning; course, lesson, and/or materials are disorganized; lecture or materials are inaccessible to many students; and/or pedagogy and/or information presented are outdated or inappropriate.

Direct Observations shall be conducted according to the schedule and criteria set forth in the Direct Observation Committee section at the top of this document. Direct observations are to be scheduled and conducted in accordance with UPS 210.080 by a member of the DOC as guided by the Direct Observation Committee Guidelines (see Appendix), use the Classroom Observation Rubric (see Appendix), and summarized in the Direct Observation Form (see Appendix). The Direct Observation Form will be submitted to the lecturer by the DOC chair for inclusion in Section 9: Additional Evidence of Teaching Performance of their WPAF. The Direct Observation Form is used by the DOC to complete the Direct Observation Evaluation Form (see Appendix), which will produce one of the four above evaluation ratings. The Direct Observation Evaluation Form will be submitted directly to the DPC to facilitate completion of the Direct Observation Evaluation Item on the DPC Lecturer Evaluation Form (see Appendix).

8. Service (Full-Time Lecturers Who are Eligible to Perform Service)

Full-time Lecturers (not Lecturers 1.0) may be eligible to teach four classes and provide service to the Department, College, and/or University in lieu of a 5th class. In such cases, service includes work in committees, student mentorship and advisement, and outreach to and engagement with the community on behalf of the Department, College, and/or University (e.g. professional associations), among other activities. This evaluation may include but is not limited to material based on service records, narrative summary, digital measures, and CV.

Appendix

Appendix: Sample DPC Lecturer Evaluation Form

Lecturer Evaluation Form Marketing Department Personnel Committee

Lecturer Name:

Date:

Review Period (select one): Annual Periodic

DPC Members (list Chair first):

Quantitative Evaluation:

Place an X in the appropriate evaluation column

Unsatisfactory = 0; Needs Improvement = 1; Satisfactory = 2; Exceeds Expectations = 3

Evaluation Item	Unsatisfactory	Needs Improvement	Satisfactory	Exceeds Expectations
Student Evaluations (Statistical summaries)				
Student Evaluations (Open Ended Comments)				
Class Grade Point Average				
Course Design				
Pedagogical and Disciplinary Currency				
Direct Observation (Overall, based on DPC Direct Observation Evaluation Form; Mark N/A if not applicable to current Period of Review)				
Service (N/A for Lecturers 1.0 or PT Lecturers)				
Column Totals:				
Mean Score:				

Is Lecturer AACSB Qualified? (N/A for Lecturers who have exclusively taught BUAD 201, 301, and/or 501 during the Period of Evaluation)

Yes

No

Insufficient Documentation/Missing Digital Measures Report (**Counts as No**)

N/A

Overall Quantitative Evaluation:

- Unsatisfactory (mean score < 0.75)
- Needs Improvement (mean score 0.75 to 1.4)
- Satisfactory (mean score 1.5 to 2.4)
- Exceeds Expectations (mean > 2.4)

Qualitative Evaluation:

Include written comments and feedback below where necessary to explain above ratings; not required in all sections if unnecessary.

Evaluation Item	Comments and Feedback
Student Evaluations (Statistical summaries)	
Student Evaluations (Open Ended Comments)	
Class Grade Point Average	
Course Design	
Pedagogical and Disciplinary Currency	
Direct Observation	
Service (N/A for Lecturers 1.0 or PT Lecturers)	

Appendix: Example Faculty Qualification Table Report

**Mihaylo College of Business & Economics
AACSB Faculty Qualification Table**

Last Name, First Name, Marketing

CATEGORY	ACTIVITY	VALUE	
Education			
No records		0	
Journal Publications			
No records		0	
Book Publications			
No records		0	
Other Publications (8 point maximum)			
No records		0	
Presentation or Proceeding (5 point maximum)			
		0	
	Total:	0	
Other Intellectual Contributions (10 point maximum)			
No records		0	
Executive Education (5 point maximum)			
No records		0	
Community Service (5 point maximum)			
No records		0	
Professional Service (10 point maximum)			
No records		0	
Student Engagement (5 point maximum)			
No records		0	
University Service			
No records		0	
Consulting (20 point maximum)			
No records		0	
Employment (20 point maximum)			
No records		0	
Developmental Activities (only one activity per item)			
No records		0	
Faculty Qualification			
Ph D	2004		
Degree Pts: 0	Peer Pts: 0	Refereed Pts: 0	Work Pts: 0
Qualification:			Additional

Appendix: Pedagogical and Disciplinary Currency Form

Pedagogical and Disciplinary Currency Form

Lecturer Name:

Date:

Review Period (select one): Annual Periodic

DPC Members (list Chair first):

Based on the output from your Faculty Qualification Table Report (see instructions below), please indicate your level of Currency and AACSB Qualification Status:

- Exceeds Expectations: > 20 points
- Satisfactory: 15 to 20 points
- Needs Improvement: 10 to 14 points
- Unsatisfactory: < 10 points

Are you exempt from AACSB Qualification because you have **exclusively** taught BUAD 201, 301, and/or 501 during the current Evaluation Period?

- Yes
- No

If desired please provide in the space below any explanation for situations in which your point totals for the required 5-year period on the Faculty Qualification Table Report are less than 20 points. In particular, please note any activities which you believe demonstrate pedagogical or disciplinary currency, but which you could not find an appropriate section in Digital Measures in which to input it:

Instructions for entering Pedagogical and Disciplinary Currency data in Digital Measures, and generating a copy of your report: [Example. May change as technology/procedures change]

- Log into the Faculty Portal
- In the left navigation menu under Apps, select Digital Measures (it may be necessary to first select “show more apps”)
- Enter and/or update all relevant activities for the preceding 5-year period. You will likely want to focus on the Professional Activities and Teaching Sections; be sure to enter information (as appropriate) in the content areas below. (**NB:** Areas in bold may be of particular relevance to Lecturers. Any workshops, seminars, tutorials, etc. completed may be entered in Developmental Activities.)
 - **Consulting**
 - **Professional Work Experience**
 - **Licensures and Certifications**
 - **Developmental Activities**
 - **Directed Student Learning**
 - **Intellectual Contributions >> Presentation or Proceeding**
 - Executive Education
 - Community Service
 - Professional Service
 - University Service
 - Awards and Honors
- Once all activities are entered, click the blue “Reports” button at the top of the page
- Select “Faculty Qualification Table”
 - Set Start Date to January 1 of the year five years prior to the current year
 - Set the End Date to December 31 of the current academic year (e.g. 12/31/20 if current Academic Year is 20/21)
 - Set File Format to Microsoft Word
 - Set Page Size to Letter
- Click “Run Report” button in the upper right
- Save the Word Document file for your records
- When preparing your WPAF, use this Faculty Qualification Table document to complete this form
- **When submitting your WPAF upload your Faculty Qualification Table Report and this Pedagogical and Disciplinary Currency and/or AACSB FQ Form to **Section 9: Additional Evidence of Teaching Performance****

Appendix: Direct Observation Committee Guidelines

Marketing Department Direct Observation Committee (DOC) Guidelines for Classroom Observation of Lecturers

In-class observations will be conducted according to the schedule and criteria set forth in the Direct Observation Committee (DOC) section of the Marketing Department Lecturer Standards. Direct observations are to be conducted by a member of the DOC as guided by the Classroom Observation Rubric and summarized in the Direct Observation Form, which will be submitted to the lecturer by the DOC chair for inclusion in Section 9: Additional Evidence of Teaching Performance of their WPAF. All observation activities will conform to UPS 210.080: Classroom Observations and UPS 210.070: Evaluation of Temporary Faculty. Classroom observations will provide valuable feedback to instructors and offer a dimensional perspective, along with Student Opinion Questionnaires (SOQs), on the instructor's performance in the performance assessment process. Please see Marketing Department Lecturer Standards for more details.

Scheduling Classroom Observations

Lecturers will have a minimum of five days' notice before a classroom observation will take place. DOC Observers are encouraged to work with the instructor to identify the best day/time for the observation. Regardless of how many sections the Lecturer teaches, only one classroom observation will be scheduled during a semester unless there are extenuating circumstances as determined by the Department Personnel Committee or Dept. Chair, or the instructor requests multiple classroom observations (dependent on DOC Observer availability). When possible, lecturers should be matched with observers who teach a generally similar course.

Classroom observations may be conducted via in-person classroom visit(s), direct attendance to online class meeting(s), or direct review of prerecorded asynchronous lecture(s) (only when no synchronous in-person or online class meetings are conducted), as determined by the DOC in consultation with the Lecturer.

Observation sessions will be the length of a single class session (one hour, 15 minutes) or online equivalent. If the class is a three-hour session, observers will only visit for one hour and 15 minutes (or online equivalent) unless the instructor and observer agree to a longer visit.

Classroom Observations Rubric

Observations will be guided by the DOC Classroom Observations Rubric, which will be available to all Lecturers from the DPC.

Feedback to Instructors

A completed Direct Observation Form will be provided to the Lecturer observed, with copies sent to the Department Personnel Committee Chair and Marketing Chair, within 10 working days of the observation.

Inclusion of Classroom Observation Report in Personnel Review

A completed Direct Observation Form must be submitted by Lecturers to their WPAF (Section 9: Additional Evidence of Teaching Performance) by the review deadline for each observation made during the current Period of Evaluation. The DOC retains copies of all Direct Observation forms conducted each year, but it is the responsibility of the Lecturer to include a copy of all pertinent Direct Observation Forms in their WPAF. The Department Personnel Committee will assess the observations contained within the Direct Observation Form to produce a Direct Observation Evaluation Rating of Exceeds Expectations, Satisfactory, Needs Improvement, or Unsatisfactory. This evaluation forms on of the criteria upon which the DPC will base its evaluation of Lecturer WPAF files.



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Appendix: Classroom Observations Rubric

Direct Observation Committee Classroom Observations Rubric

DOC Committee Evaluator Name: _____ Lecturer Name: _____

Date: __/__/__

Trait	Assessment Points
Lesson Strategy, Activities, and Delivery	<ul style="list-style-type: none">• Instructional strategies are appropriate to lesson objectives• Students are actively engaged (active learning)• Course content is communicated accurately• Class period is used well
Classroom Management and Leadership	<ul style="list-style-type: none">• Class is well organized• Students receive positive reinforcement• Class discussion remains on topic and moving toward a goal• Instructor provides a model for professional demeanor
Student Engagement and Real-Time Assessment	<ul style="list-style-type: none">• Students actively participate in the learning process• Students' comprehension of content is assessed during discussion or activities (checks for understanding)• Common misunderstandings are identified and corrected

Appendix: Direct Observation Form

Direct Observation Form (To be completed by DOC Observer)

DOC Observer: Please indicate observations for each section. Recommendations for Lecturers should be *goal-oriented*. Even if an observation report is positive, setting goals provides continuous improvement opportunities for all Lecturers.

Trait	Observations and Suggested Goals for Improvement
Lesson Strategy, Activities, and Delivery	
Classroom Management and Leadership	
Student Engagement and Real-Time Assessment	

Appendix: DPC Direct Observation Evaluation Form

**DPC Direct Observation Evaluation Form
(To be completed by DOC Observer)**

DPC Member: Mark evaluation level with an **X** based on DOC Evaluator observations on Direct Observation Form

Trait	Unsatisfactory	Needs Improvement	Satisfactory	Exceeds Expectations
Lesson Strategy, Activities, and Delivery				
Classroom Management and Leadership				
Student Engagement and Real-Time Assessment				

Criteria	Definitions
Exceeds Expectations	Has clearly established a learning environment conducive to learning; has clearly organized the course, lesson, and learning materials, which are widely accessible; uses varied approaches to engage students of different learning styles; and brings innovative pedagogy and relevant information to the lesson.
Satisfactory	Has reasonably established a learning environment conducive to learning; course, lesson, and learning materials are reasonably organized and accessible; adjusts approach for students of different learning styles; and brings current pedagogy and relevant information to the lesson.
Needs Improvement	Is somewhat deficient in creating an enriching learning environment, in course organization, in making material accessible and engaging to all students, and/or uses dated pedagogy or irrelevant/dated information.
Unsatisfactory	Has not created a learning environment conducive to learning; course, lesson, and/or materials are disorganized; lecture or materials are inaccessible to many students; and/or pedagogy and/or information presented are outdated or inappropriate.



Mark as shown: Please use a pencil or a dark pen to mark an X inside the box of your choice.

Correction: If you make a mistake, erase or completely fill in the box with the wrong answer and mark an X for the correct answer.

1. Student Opinion Questionnaire

EVALUATE YOUR INSTRUCTOR'S...

	Excellent	Good	Average	Fair	Poor
1.1 Organization of the course	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.2 Knowledge of course content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3 Preparation for class	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.4 Ability to communicate subject matter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.5 Willingness to help students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.6 OVERALL teaching effectiveness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Indicate your level of agreement with the following statements...

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
1.7 Course content challenged me.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.8 I would recommend this INSTRUCTOR to other students.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. Comments

2.1 What aspects of the course contributed the most to your learning experience?

Please continue to page 2. Do not write in the space below.



2. Comments [Continue]

2.2 Please give feedback on what you found effective about the instructor's teaching style.

2.3 Please give suggestions on how this class can be improved.

2.4 Additional comments:





Mark as shown: Please use a pencil or a dark pen to mark an X inside the box of your choice.

Correction: If you make a mistake, erase or completely fill in the box with the wrong answer and mark an X for the correct answer.

1. Student Opinion Questionnaire

EVALUATE YOUR INSTRUCTOR'S . . .

	Excellent	Good	Fair	Poor	Very Poor
1.1 Organization of the course	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.2 Knowledge of course content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.3 Quality of materials conveyed over the web	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.4 Effective delivery of course material	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1.5 Willingness to help students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1.6 Indicate your overall learning experience in the course

Indicate your level of agreement with the following statement

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
1.7 I would recommend this instructor to other students.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



2. Comments

2.1 What grade do you expect in this online class?

2.2 What did the instructor do well?

2.3 What could the instructor do to improve the class?

2.4 Additional Comments:

