

# Department of Management Bylaws



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## **I. Department of Management Bylaws: August 29, 2022.**

### **II. Organization and Operation**

- A. Preamble.** These bylaws, adopted by the Management Department on August 29, 2022, in accordance with the University of Wisconsin System and the University of Wisconsin – La Crosse Faculty and Academic Staff Personnel Rules, supersede all previous departmental bylaws currently in effect.
- B. Definitions of Membership and Voting Procedures** (refer to Appendix A for full responsibilities of all UW-L departments, department members, and Department Chairpersons).
  - i.** All ranked faculty and instructional academic staff in the Management Department shall constitute the Management Department faculty.
  - ii.** Ranked faculty
    - 1.** In accordance with the UW-L Articles of Faculty Organization, all persons with tenure or probationary appointments, having the rank of professor, associate professor, assistant professor, or instructor shall constitute the ranked faculty.
    - 2.** Ranked faculty holding a 50% or greater appointment will have full rights and privileges in the Management Department as described herein.
  - iii.** Academic staff
    - 1.** Academic staff appointments may be fixed term, probationary, or indefinite.
    - 2.** Full time academic staff have a 100% position appointment for at least two consecutive semesters, whereas part time academic staff have less than 100% position appointment for two consecutive semesters.
    - 3.** Academic staff may be instructional academic staff (IAS, when primary core function is instruction and assessment of students), non-instructional academic staff (when none of their appointment involves instruction), or a combination.
  - iv.** Voting procedures
    - 1.** All Management Department faculty shall be equal Voting Members of the department, with noted exceptions:
      - a.** Adjunct faculty, full time IAS and part time IAS with at least 50% of their appointment in the Management Department are not eligible to:
        - i.** Vote on personnel matters regarding appointments and leaves for which they have conflicting interests (e.g., appointment for new hire to fill that faculty member's current position).
        - ii.** To serve on the department merit committee, unless they have been in the department full time for at least one year and their salaries contribute toward the department merit pool.
      - b.** Part time academic staff with less than 50% position contract or not contracted for one full academic year are not eligible to:
        - i.** take part in department governance
        - ii.** vote on matters requiring a department vote

- iii. serve as voting members as department committees

### C. Meeting Guidelines

- i. The Department shall meet at least once each semester (“Department Meeting(s)”) in order to conduct departmental business. The Department Chair, any Department committee Chair, or other Department member may request a Department Meeting in order to discuss or to act upon departmental matters. The Department Chair will attempt to schedule Department Meetings at times when all members of the Department are able to attend.
- ii. **Definition of Quorum and Majority:** A quorum for Department Meetings shall consist of a majority of the voting members of the Department who are eligible for the given vote. Proxy votes shall not count in determining whether or not a quorum is present. Members who join by teleconference and have heard all deliberations are eligible to vote.
- iii. **Voting**
  - 1. **Proxy voting:** Written proxy voting shall be permitted on all matters brought before the Department or any Department committee for a vote. Proxy votes shall be submitted either by paper ballot or electronically (e.g., by electronic mail) to the Department Chair or to the appropriate Department committee Chair at least thirty minutes before the publicized commencement time of the meeting at which a vote is scheduled. If a proposed motion is announced at least three days prior to the meeting, then the Committee Chair or Department Chair will afford any faculty member who is on sabbatical or other leave the opportunity to vote by proxy.
  - 2. **Closed Session Voting:** One of three options is available for handling closed session voting.
    - a. Record who voted how.
    - b. Used signed ballots and place in sealed envelope.
    - c. Post in advance the meeting will go into closed sessions for the deliberations and then return to open meeting status at a specific, pre-determined time, for the vote. The open meeting vote can be a show of hands; only if the observer is physically present at the time of the vote.

### III. Scheduling of Classes

#### A. Introduction

The Department Chair, in consultation with each Department member, shall be responsible for establishing the teaching load for each Department member and for managing the overall workload of the Department.

#### B. Priorities

The following priorities shall be observed by the Department Chair with respect to the scheduling of classes in the Department for each Department member:

- i. To follow the Department's "Master Plan of Course Offerings."
- ii. To attempt to meet both students' needs and the preferences of each Department member; however, students' needs will usually take priority over scheduling preferences of a Department member in the case of a conflict between the two.
- iii. To make every reasonable effort to match class offerings with the qualifications and experience of each Department member. No Department member shall have an exclusive claim to teach any given course.
- iv. To make every reasonable effort to balance equitably the teaching load of each Department member. This balance shall include, but shall not be limited to, such things as the number of preparations, and new preparations, the number of students in each class, and class meeting times for each Department member.
- v. To make every reasonable effort to avoid assigning three preparations to a Department member.

#### C. Teaching Loads

The following standards shall be maintained by the Department Chair with respect to the assignment of teaching loads in the Department for each Department member:

- i. **Ranked Faculty.** Ranked faculty whose teaching performance is deemed satisfactory and whose scholarly activities meet the University's College of Business Administration ("the CBA") scholarly productivity guidelines shall be assigned a nine-credit hour teaching load each semester. Ranked faculty whose scholarly productivity output is below the CBA scholarly productivity guidelines shall be assigned a twelve-credit hour teaching load.
- ii. **New Ranked Faculty.** Newly appointed ranked faculty with less than five years' experience shall be assigned a nine-credit hour teaching load during their initial six semesters in order to stimulate professional development and scholarly activity.
- iii. **Compliance with Scholarly Productivity Guidelines.** For purposes of determining compliance with the CBA scholarly productivity guidelines in the assignment of teaching loads, research accepted for publication but yet to be published shall be counted as published research output.
- iv. **Full-time Academic Staff.** Full-time Academic Staff shall be assigned a fifteen-credit hour teaching load each semester, provided, however, that any Full-time Academic Staff members may, at their option, request that they substitute a full load of

student advising or other acceptable work assignment in lieu of three hours of the fifteen-credit hour teaching load. Such requests should be approved by the Department Chair prior to creating course schedules for the relevant terms.

- v. **Part-time Academic Staff.** Part time Academic Staff shall be assigned less than a fifteen-credit hour teaching load each semester.

#### **D. Summer Session, J-Term, and Overload Appointments**

- i. **Call for Interest.** The Chair will put out a call for interest in teaching summer, J-term, and any needed overload courses each year. If teaching positions remain unfilled, the Chair may seek out instructors, first inside and then outside of the department, to teach needed classes.
- ii. **Overload Teaching by Ranked Faculty.** By mutual agreement between the Department Chair and an individual ranked faculty member, such member may elect to teach more than a nine-credit hour load in any given semester, provided, however, that such faculty member shall be remunerated over and above a nine-credit hour teaching load pursuant to the then current CBA rules with respect to remuneration for overload teaching. Such overload teaching shall not be substituted in lieu of a full load of student advising.
- iii. **Eligibility and Remuneration for Summer and J-term.** The Department shall determine the criteria and eligibility of Department members for summer/J-term session appointments and the method of remuneration on an annual basis prior to determination of the Department's summer/J-term schedule.
- iv. **Scheduling of Summer Courses and J-term Courses.** Scheduling of Summer Session and J-term (a.k.a. "Winter Session") courses shall be consistent with the criteria set out in Paragraphs A and B of this Article (Article III). In addition, if the supply of faculty wishing to teach exceeds the available courses, then the courses shall be allocated to faculty using the following criteria in order:
  - 1. Preference will be to comply with any college/university requirements.
  - 2. Preference will be given to faculty members in reverse order of length of time since last having taught summer, J-term, and/or an overload course.
  - 3. Preference will be given to the faculty member with seniority.
- v. **Cancellation of Summer Courses.** Summer teaching appointments may be cancelled by the instructor any time before the predetermined deadline for any reason. All faculty have the right to teach a scheduled course with any enrollment for the remuneration allocated.

#### **E. Online & Hybrid Course Policy (approved by department vote April 1, 2022)**

- I. The Department of Management is committed to providing course modalities that best align with departmental, pedagogical, and student needs.
  - a. Definitions. Possible course modality types include face-to-face (in-person), hybrid, online synchronous and online asynchronous. These types are defined in the UWL Online Courses and Education Policy

(<https://www.uwlax.edu/records/faculty-staff-resources/curriculum-change-process-policies>).

- b. Course Offerings. Management classes are normally offered in a face-to-face modality. Online/Hybrid courses will be offered when they align with departmental, pedagogical, and student needs.
  - i. Reasons a given course may be offered online or hybrid include but are not limited to (1) Episodic labor supply issues (e.g., local specialized instructors are unavailable for a course, faculty are navigating health-related needs) and (2) Allowing greater access and convenience to students (e.g., for students to continue coursework over the J-term and Summer sessions)
  - ii. Approval for a course to be offered for the first time in hybrid or online format must be made prior to the entry of the semester schedule into WINGS, with approval of the Curriculum Committee and Chair, unless in emergency circumstances.
  - iii. Final determination for course assignments and delivery method is held by the Department Chair.
  - iv. Class sizes for a given course in the department should be consistent across modality.
- c. Instructional Eligibility. All Department faculty are eligible to teach courses fully online or in hybrid format, as needed by the department, if they present evidence that they have the skills to teach online or in hybrid format. Evidence can include successful completion of UWL's online course preparation and development training (or that of another comparable program).
  - i. In the event that more faculty are interested in teaching hybrid/online than would align with departmental norms and expectations, preference will be given to 'need-based requests' (e.g., to accommodate health needs or local labor shortages). Preference will also be given to faculty who have not taught online/hybrid during the past academic year (allowing for faculty to teach hybrid/online on a more rotational basis).
- d. Criteria and Assessment. Online or hybrid courses taught during the standard fall and spring semesters must be subject to the same review processes as face-to-face courses. Online and hybrid courses should demonstrate achieving the same criteria for effectiveness as face-to-face courses, and also should be assessed according to established criteria specific to that modality.

#### IV. Other

- A. Office Space. Office space will be determined by seniority according to Date of Hire into the Management department for those members who are in red-booked or permanent budget line positions. In circumstances same date of hire, the department chair will determine the process (approved 9-20-2019).

## **V. Department Policy for Leaves and Travel**

### **A. Introduction**

The Department shall encourage faculty to seek sabbatical and faculty development leaves, research funding, and international teaching exchanges. The following should serve as procedures and guidelines for sabbaticals, faculty department leaves, faculty exchanges, family and medical leaves, leave without pay, and travel reimbursement.

### **B. Procedure for Sabbaticals, Faculty Development Leaves, and Faculty Exchanges**

- i. Sabbaticals and Faculty Development Leaves.** Requests for sabbatical and faculty development leave shall be submitted in writing to the Department Chair at least one week prior to submission of a formal application.

Requests:

1. Shall include information as to how and why the requested leave will benefit the Department, and
2. Shall outline the details of how the Department will be kept informed of the applicant's research activities by means of such things as, but not limited to, reports, and records.

The applicant may provide this information to the Department Chair by submitting a copy of his or her Sabbatical or Faculty Development Leave proposal. Current information on program requirements and due dates may be obtained by the applicant from the Office of the Provost/Vice Chancellor.

- ii. Faculty Exchanges.** Requests to teach abroad during an academic year through one of the University's exchange programs shall be submitted in writing to the Department Chair at least one week prior to submission of a formal application to the University's International Education and Engagement Office and/or the University's International Education Committee. If the request is for a period of time less than one semester in length, it shall indicate how the applicant's teaching assignments will be covered during the applicant's absence from campus. Current information on program requirements and due dates may be obtained by the applicant from the Office of the Provost/Vice Chancellor.
- iii. Formal Recommendation.** A majority of the voting members of the Department shall determine whether or not to recommend a faculty member to the Dean for a sabbatical or faculty development leave or for a leave to teach abroad on one of the University's exchange programs. The Department Chair shall be responsible for forwarding the determination of the faculty in this regard to the Dean. Department members requesting leaves shall not be eligible to vote on these matters.



### **C. Procedures for Family and Medical Leaves and Leaves without Pay**

- i. Family and Medical Leaves.** Eligible faculty may receive up to 12 weeks of unpaid, job-protected leave for certain family and medical reasons. Current information on eligibility requirements and benefits payable under the federal Family and Medical Leave Act of 1993 and the state Family Leave Act of 1988 are available from the Office of the Provost/Vice Chancellor.
- ii. Leaves Without Pay.** Other requests for unpaid leaves that necessitate reassignments of teaching loads and/or the hiring of additional faculty shall be submitted in writing to the Department Chair at least six months prior to the desired absence. Only in extenuating circumstances shall the Department Chair consider a request for unpaid leave made with less than six months' notice.
- iii. Formal Approval.** A person may apply to take Family & Medical Leave or other forms of leave to which they are entitled under the law or university policy by contacting the Dept. Chair, CBA Dean, and the UW-L Human Resource Department.

Additional leave or leave that is not an entitlement (e.g., leave without pay) requires department approval. A majority of the voting members of the Department shall determine whether or not to approve an application from a Department faculty member for such leave.

A majority of the voting members of the Department shall determine whether or not to approve an application from a Department faculty member for leave without pay. A Department faculty member requesting leave shall not vote. Approval shall require the Department faculty member to notify the Department by a specified date whether or not the Department faculty member intends to return to the Department at the conclusion of the leave.

### **D. Procedures for Travel Reimbursement**

- i. Principles.** Department members should apply for funds from outside sources when appropriate. International travel should be funded, in part, by international travel grants. Department members should not expect to receive funding for international travel without having applied for an international travel grant. Travel for administrative purposes, such as search and screen, or AACSB affiliated, or assessment related, etc. should be funded by the Deans office. All department members are expected to follow the current University travel guidelines.

**ii. Process.**

1. Each academic year Anticipated Travel Forms should be filled out and presented to the Department Chair by September 15th for each conference the department member would like to attend. Should a department member wish to travel to more than one conference, the faculty member should rank order their requests. The Department Chair will then use the anticipated travel budget and the guidelines below to budget travel for the year. The Chair will then communicate to the department members the requests that can be funded.
2. If travel plans change, faculty members should inform the Chair immediately so that the travel funds may be reallocated to unfunded travel proposals using the guidelines below.
3. A travel authorization form should be completed online prior to travel.
4. A campus absence form (or other form consistent with UW-L and department travel policies) should be filled out one week prior to departure.
5. A Travel Expense Report (TER) (or other form consistent with UW-L travel policies) should be completed promptly upon return from travel. This ensures that the Chair can monitor expenditures relative to the anticipated budget and make necessary adjustments.

**iii. Priorities in allocating travel money.** The first priority for the department travel funds is to fully fund at least one professional conference for each department member. Should the pool of travel funds be nominally oversubscribed based on the first choice of department members the Chair can - at the Chair's discretion - approve travel requests for less than full funding so as to increase the number of department members able to travel to at least one conference. If the pool is more than nominally oversubscribed the Department Chair can distribute funds based on the prioritization below. Once all requesting individuals have at least one conference funded, the remainder of the funds should be distributed based on the prioritization below.

**iv. Priorities for the Chair to weigh, in approximate order of importance.**

1. Papers accepted for presentation (for ranked faculty) or professional development needed for professional qualifications (for IAS)
2. Appearance on the conference program as Session Chair, Organizer or Discussant;
3. Untenured ranked faculty;
4. Recent history of success with converting presentations into publications;
5. Longer amounts of time since last travel grant.

## **VI. Committees**

**A. Introduction.** The Department shall maintain the following committees:

- i.** Promotion, Retention, and Tenure Committee (the PRT Committee).
- ii.** Post-Tenure Review Committee (the PTRC Committee”).
- iii.** Merit Committee.
- iv.** Planning and Curriculum Committee.
- v.** Assessment Committee
- vi.** Bylaws Committee
- vii.** Inclusive Excellence Committee
- viii.** Ad-Hoc Search and Screen Committee
- ix.** Such other committee or committees as the Department may deem appropriate from time to time.

**B. Committee Procedures.** The following procedures shall apply to all Department committees:

- i.** After committee membership is determined, the Department Chair shall designate one of the members to convene the committee.
- ii.** Each committee shall elect a Chair and a recorder (or the committee may decide to rotate the responsibility for recording the minutes of each meeting).
- iii.** The Chair of each committee shall be responsible for arranging a meeting room and submitting any required notice of meeting to the Academic Department Associate in order to ensure compliance with the Wisconsin Open Meeting Law.
- iv.** The recorder shall circulate minutes of each meeting within two weeks of the meeting. The recorder shall also file one copy of the minutes in the Office of the Department with the Academic Department Associate.

**C.** Unless otherwise designated in a particular committee’s bylaws, proxy voting shall be permitted.

**D.** With the exception of the PRT Committee, the Department Chair shall be an ex-officio, non-voting member of all departmental committees.

## **VII. Promotion, Retention, and Tenure (PRT) Committee**

### **A. Membership**

- i.** The PRT Committee shall consist of all tenured faculty of the Department.
- ii.** No faculty member in the Department who is applying for promotion shall participate in their promotion decision or the promotion decision related to any other faculty member in the Department who is also applying for promotion.
- iii.** If there are fewer than three tenured faculty in the Department, a tenured faculty member from another CBA Department shall be asked to serve by the Department Chair. The Department Chair shall take into account the level of familiarity with the Department subject matter when determining any additional committee members to invite. If no other tenured faculty in the CBA is able/willing to serve, the Department Chair shall ask tenured faculty outside the CBA. If the Department Chair is unable to find any UWL tenured faculty to serve, the CBA Dean shall appoint the member(s).
- iv.** The PRT Committee shall elect its Chair at its first meeting of the academic year by a simple majority of the committee members voting. The term of office shall be one academic year. The PRT Committee Chairperson shall be the official and sole spokesperson for the committee.

### **B. Responsibilities**

- i. Review of Faculty for Promotion, Retention, and Tenure.** The PRT Committee shall evaluate files of faculty for: (i) promotion from the rank of Assistant Professor to the rank of Associate Professor, (ii) promotion from the rank of Associate Professor to the rank of Professor, (iii) retention of Professors and renewal of their annual employment contracts with the University, (iv) retention and renewal of annual employment contracts of Academic Staff with Faculty Status and Academic Staff without Faculty Status and (v) the awarding of tenure with confirmation by the Chancellor.
- ii. Voting.** A two-thirds majority of the tenured members of the department shall be required on renewal and tenure decisions. Tenured faculty not present at meeting for the consideration of faculty for promotion, renewal, or tenure shall have the right to vote by proxy. Either electronic or paper proxy votes may be submitted; these should be submitted to the PRT Committee Chair at least 30 minutes prior to the scheduled meeting. According to UW System policy, for a tenure decision and only if a candidate requests it in advance, the PRT vote must be a public vote. Furthermore, it is recommended by UW-System the entire meeting be conducted as an open meeting.
- iii. Criteria for Review.** The criteria for review that shall be used by the PRT Committee is set forth in Article XIII and by this reference is made a part hereof as if fully incorporated herein. (Because merit is considered when reviewing candidate files, the PRT Committee members should also note that the Merit System is described in Appendix B.)

- iv. **Recommendation of Faculty for Promotion, Retention, and Tenure.** The PRT Committee shall make (i) faculty promotion recommendations to the Dean and the Joint Promotion Committee and (ii) retention and tenure recommendations to the Chancellor through the Dean of the CBA via the PRT Chair.
- v. **Reconsideration of Action Taken.** The PRT Committee shall hear requests for reconsideration of the action it takes.

## **VIII. Post-Tenure Review Committee (PTRC)**

### **A. Membership**

- i. In accordance with UWL policy, the PTRC Committee shall be comprised of all tenured faculty members, with a minimum of three tenured faculty members. The Department Chair serves as a committee member and chair of the committee unless the department chair holds tenure in another department, or is being reviewed. In either of these two cases, the committee shall elect a chair to complete the administrative components of the process. In the event that there are not three tenured department members, the Department Chair, in consultation with the Dean and the faculty member, shall meet to select outside members using the criteria in Appendix D as a guide. If there is not a mutual agreement, the Dean shall have the final say in the selection of the outside members.

### **B. Responsibilities**

- i. In accordance with UWL policy, the post-tenure review committee will meet to review the faculty member's materials and determine whether the faculty member 1) meets expectations or 2) does not meet expectations.
- ii. All procedures for notification and action plans will follow the UWL PTR policy located at <https://www.uwlax.edu/human-resources/post-tenure-review-policy/>
- iii. Criteria for decision making are specified in the next section (C. Retention Criteria)

## **IX. Merit Committee**

### **A. Membership**

The Merit Committee will conduct the evaluation process. The Merit Committee will be composed of at least three tenured faculty in the department. Faculty members who are on a terminal contract are not eligible to serve on the committee. The Merit Committee will elect a chair to manage the evaluation process. The chair will be voted on at the last meeting of the academic year or the first meeting of the new academic year. The Department Chair is not eligible to chair the committee. Additionally, non-tenured ranked faculty in their first or second year are invited to join the committee as non-voting members and are encouraged to do so one of the two years.

### **B. Responsibilities**

- i. Faculty whose salaries contribute toward the departmental merit pool shall submit a completed merit form to the Merit Committee.

- ii. The Merit Committee shall evaluate these merit forms and assign merit points using the criteria set forth in the merit bylaws.
- iii. The Merit Committee shall present its annual merit report to the Department for approval. This report shall include each Department member's merit designation for each merit category and as a total. After approval by the Department, the Merit Committee's recommendations of merit pay increases shall be forwarded to the Dean.

## **X. Planning and Curriculum Committee**

### **A. Membership**

- i. The Management Department Planning and Curriculum Committee will consist of at least three department members, representing as many functional areas as possible.
- ii. Committee membership shall be for one year, beginning with the fall semester.

### **B. Responsibilities**

- i. Assist the Department Chair in the development of policies and/or strategies for the recruitment of business administration majors and the surveying of recent alumni for assessment and/or placement information.
- ii. Continuously evaluate the Management Department curriculum in light of accreditation standards, national and regional curricular trends, and placement needs. Initiate curriculum proposals that further departmental, college and university objectives.
- iii. Receive, evaluate and act upon all management department curriculum proposals.
- iv. Recommend curriculum proposals to the department.
- v. Consider, evaluate and respond to external curriculum initiatives that could impact the Management Department's curriculum. Make recommendations to the department as needed.

## **XI. Assessment Committee**

### **A. Membership**

- i. The Management Department Assessment Committee will consist of at least three department members, representing as many functional areas as possible.
- ii. Committee membership shall be for one year, beginning with the fall semester.

### **B. Responsibilities**

- i. Evaluate the Management Department curriculum in light of accreditation standards, national and regional curricular trends, and placement needs. Initiate assessment proposals that will make continuous improvement of content as well as delivery of the curricula.
- ii. Recommend assessment proposals to the department which will result in quality assessment of the curricula.
- iii. Assist the Department Chair in the development and completion of assessment reports that might be required by the department, college or the university.

## **XII. Inclusive Excellence Committee**

### **A. Membership**

- i. The Management Department Inclusive Excellence Committee will consist of at least three department members, with the goal of reflecting various dimensions of diversity within the Management Department.
- ii. One of the committee members will also serve in the role of Equity Liaison for the Department at the university level.
- ii. Committee membership shall be for two years, beginning with the fall semester. Ideally, there will be a rotating membership to allow continuity and transfer of committee knowledge.

### **B. Responsibilities**

The Inclusive Excellence Committee organizes and facilitates departmental engagement in activities that advance Inclusive Excellence and produces the year-end report detailing the Department's Inclusive Excellence contributions. The committee is responsible for the enhancement of the knowledge and expertise of Department members as a group with particular attention to programmatic and instructional issues and inclusive excellence. In addition, the committee is charged with developing the action steps associated with the department's specific DEI-related goals.

## **XIII. Ad Hoc Search and Screen Committee**

### **A. Membership**

- i. The Management Department shall create a Search and Screen Committee to fill vacancies within the department.
- ii. A Management Department Search and Screen Committee shall include at least three members of the department, with at least one of these representing the functional area being searched.

- iii. The Search and Screen Committee should attempt to reflect diversity by gender, nationality and/or minority status. If this is not possible, the Department Chair, in consultation with the Dean and the Affirmative Action Office, may solicit Committee members from outside the Department to achieve a diverse committee.

#### **B. Responsibilities**

- i. The Search and Screen Committee shall consult with the UW-L Affirmative Action Office to insure compliance with all federal and state equal opportunity employment and affirmative action laws and regulations, as well as UW-L Affirmative Action requirements.
- ii. The committee shall draft and disseminate the position announcement regionally, nationally and, if appropriate, internationally. The announcement shall include a description of the position, application requirements, and the deadline for submitted applications.
- iii. The Committee shall screen all submitted applications to identify a pool of qualified candidates. After consultation with the Dean and the Affirmative Action Office, one or more candidates may be invited to interview on campus.

### **XIV. Merit Evaluation**

The results of merit reviews for all ranked faculty who have completed at least one academic year at UWL are due to the Dean's Office on Dec. 15 annually. Merit reviews reflect activities during the prior academic year ending May 31. All faculty and IAS have a June 1st deadline for entering teaching, scholarship, and service activities into the electronic portfolio system on activities from the prior year June 1st – May 31st. The merit portfolio for department review will be due by September 15.

The areas of review shall include Teaching, Scholarship, and Service activities. For IAS, the areas of review shall include Teaching, Professional Development and/or Scholarship, and Service activities. For all IAS, the annual merit review may coincide with and include any concurrent retention and/or promotion review. For all non-tenured, Ranked Faculty members, the annual merit review may coincide with and include any concurrent mid- contract, retention, promotion, and/or tenure review. For all tenured, Ranked Faculty members, the annual merit review may coincide with and include any concurrent promotion and/or post-tenure review. IAS merit review will be done in accordance with Section VI. The criteria and procedures for faculty merit shall be as follows:

**Annual Activity Reports.** Each year during the first week of May, the Merit Committee Chair will remind all faculty to update their electronic portfolio. The annual activity report shall serve as a vehicle for self-evaluation, which, along with other evidence of Teaching, Scholarship/Professional Development, and Service activities, will form the basis for the annual review. Faculty members should also evaluate themselves using the categorical scales provided in Appendix E.

For all faculty members, effective Teaching, Scholarship/Professional Development, and Service will be assessed via the evidence and artifacts reported in the annual activity report. Faculty should reference Appendices A-C for guidelines and examples of evidence that may be used to demonstrate effective Teaching, Scholarship, and Service. A brief narrative (maximum 2 pages) contextualizing the faculty



member's evidence and artifacts, should be provided.

The committee will contextualize its evaluation of teaching evidence, including grade profile and Student Evaluation of Instruction (SEIs), in terms of the instructor's teaching methods and goals and the instructor's ongoing efforts to improve student learning and close gaps in student learning. The committee will further contextualize responses to the required SEIs in relationship to the required student motivation item. The faculty member is encouraged to include in their narrative statement an explanation of the relationship between the instructor's grading standards and the grade distributions evidence in the TAI and may reference specific teaching evidence that supports the explanation.

### **Evaluation Processes & Criteria.**

**Faculty.** Faculty members shall be evaluated annually for merit, and the distribution of any merit salary dollars shall be based upon this annual evaluation and on whether the position generates merit dollars. The evaluation shall consider all criteria listed below in Appendices A-C. In addition, the annual merit evaluation of faculty must differentiate between levels of merit. Merit reviews reflect activities during the prior academic year ending May 31.

**Merit Review Procedures.** The Merit Committee Chair will send a written notification of merit review to all eligible ranked faculty. The notification should include Merit Guidelines and a request for the Annual Activity Report, merit narrative and self-evaluation using the merit form (see Appendix E). Each ranked faculty member will be responsible for preparing and submitting the documents used for Merit Evaluation to the Merit Committee by the deadline provided. Faculty members who are on approved leave shall be considered for merit and may be considered for extra merit. They are expected to submit a completed merit document, adapted to describe their leave and other professional activities as relevant.

Merit Committee members will complete the Merit Evaluation Form for all faculty being reviewed; the results are then tabulated and shared among the committee. The Committee may go into closed session, consistent with relevant Wisconsin statutes. After discussion, the committee will vote to determine each faculty member's merit designation. Committee members should not participate in deliberations involving their own files. Within seven calendar days of completion of the reviews, the Merit Committee Chair shall notify each faculty member, in writing, of the results of overall annual merit ratings (not-meritorious or meritorious) and the extra-meritorious ratings, if applicable, for the specific areas of teaching, research, and service. Those persons not receiving a meritorious designation shall be notified, in writing, of the reasons for this action.

**Scoring.** Based on the merit definitions identified below, each Merit Committee member will assign overall annual merit ratings (not-meritorious or meritorious) as well as indicate extra-meritorious ratings, if applicable, in the specific areas of teaching, research, and/or service based on the teaching, research and service expectations of the department (See Department Statements in Appendices A-C). In the overall category, the faculty member will be assigned the highest overall score (Not-Meritorious or Meritorious) given by one half or more (simple majority) of the Merit Committee. Extra Meritorious will be assigned to any individual who receives an "extra merit" rating by at least two-thirds of the Merit Committee in each area (teaching, research and service) individually. Individuals who are not meritorious in any area are not eligible for extra meritorious designation in another area.

## **Merit Ratings**

**Meritorious.** A meritorious designation denotes satisfactory performance related to a faculty member's responsibilities and expectations. To receive a meritorious designation, faculty members must perform their Teaching responsibilities at a satisfactory level (Appendix A), as determined by students and peers, meet scholarship expectations (Appendix B), meet department service responsibilities (Appendix C), and demonstrate professional behavior (Appendix D).

**Extra Meritorious.** An extra meritorious designation recognizes the need to differentially reward faculty for levels of performance and individual accomplishments that exceed the expectations of the department and fall outside of the normal expectations of the job. Extra meritorious in teaching, research and/or service will be assigned to any individual who received an extra meritorious rating by at least two-thirds of the Merit Committee members in the appropriate category. Extra-meritorious ratings are, by definition, infrequent in the department. Therefore, the failure to achieve an extra-meritorious rating should not be taken as a signal that one's job performance is unsatisfactory.

**Not-Meritorious.** To be considered in this category, the committee must have some form of evidence, beyond hearsay, that the individual had deficient performance (e.g., written record of student complaints, letters from UWL peers documenting failure to meet expectations, etc.). Non-meritorious activities include but are not limited to:

- Violations of the behavioral guidelines outlined in the Statements of Teaching, Research, Service and/or Professionalism.
- Violations of AOM/AACSB ethical codes for teaching or service
- Met with classes less than 75% of the required time or not in the modality designated in Wings without approval by the Department Chair.
- Failure to keep electronic portfolio updated as required by the department, college and university
- Rarely available to students outside of class/failure to hold office hours
- Limited or non-responsive to emails from students, colleagues or leadership
- No syllabus or inadequate syllabus
- Lack of participation in departmental and/or college program assessment
- Content and material clearly out of date
- Content and/or tests did not reflect course outlines or objectives
- Inappropriate treatment of students (as outlined in university guidelines)
- Failure to meet with advisees
- Deficient university service (e.g., no committee work and/or poor committee service (e.g., not attending meetings)
- Deficient departmental service (e.g., unreliable, inadequate completion of tasks, abuses of power)
- Deficient scholarship (e.g., no signs of professional development or engagement in scholarship; no documented evidence of advancement in scholarship)
- No evidence of trying to attain goals as stated by the candidate

**Department Chair.** The department chair participates in the ranked faculty merit evaluation in the same manner as all other ranked faculty.

**Distribution of Merit Funds.** Annually, the Department may be allocated merit monies as determined by the action of the state legislature, the Board of Regents, and/or the UW-System Administration. These monies shall be distributed to Department members based on the merit ratings assigned through

the annual merit review process described above. The pool of merit funds for IAS is separate from the Ranked Faculty pool.

All faculty members judged to meet their basic responsibilities as “meritorious” and granted 100% shall receive the state-allotted meritorious performance raise. All faculty who receive an overall evaluation of “meritorious performer” will receive an equal share of the remaining merit pool.

Note that when a whole-department merit designation is used for monetary reporting issues, the Ranked Faculty and IAS must be split into two separate merit category distributions because two separate sources fund these different populations. At the appropriate time, the Department Chair (or Human Resources Office) will communicate the merit adjustment dollars awarded to each faculty member.

Merit pay increases will not be made in years when merit funding is unavailable. The Committee will consider the annual merit ratings retroactive to the previous year and apply the highest evaluation to make the merit pay increase equitable when merit funds are made available.

**Appeal Procedures.** A faculty member may request a reconsideration of their annual merit ratings. The Committee will reconsider a member’s merit evaluation upon receiving a written request. This written request must include reasons for reconsideration and appropriate, relevant documentation must be submitted to the Department Chair within seven calendar days of notification of the annual review results.

The Committee will meet to reconsider its action. The Merit Committee may go into closed session consistent with pertinent Wisconsin state statutes for this reconsideration meeting. The resulting recommendation will then be presented to the faculty member, in writing, within seven calendar days of the reconsideration hearing. At the department level, the reconsideration recommendation of the committee is considered final.

Appeals beyond the department level may be presented to the Complaints, Grievances, Appeals and Academic Freedom (CGAAF) Committee (see Section II.G. of the Faculty Senate Bylaws -- <https://www.uwlax.edu/faculty-senate/articles-bylaws-and-policies/>). As in all processes involving the evaluation of personnel, mechanisms for merit evaluation appeals beyond the department level are established on this campus. Your attention is directed to the UW-System Administrative Code, the local UWL Faculty Rules, and the UWL Faculty Handbook.

## **XV. Retention (Tenure)**

**A. Introduction:** The following bylaws as they relate to promotion, renewal, and tenure were adopted by the tenured members of the Department of Management in accordance with the University of Wisconsin-La Crosse Faculty Handbook and the Faculty Personnel Rules. The bylaws establish procedures and criteria for promotion, renewal, and tenure.

**B. Procedures for Renewal of Probationary Appointments and Granting of Tenure:** In accordance with UWL 3.05 (Periodic Review), the department Chair shall give written notice to faculty in the renewal and tenure decision year at least 20 days before the PRT review. This notice shall inform the faculty members of the date of the review, the appropriate forms for

reporting their performance in the review areas for the time period under review, and the date by which the required information should be completed and submitted.

- i. The PRT Chair shall communicate to the faculty information regarding the schedule for the review. Candidates may attend this meeting and present oral testimony in support of their candidacy.
- ii. The faculty member under review shall make available to the PRT Committee Chair the following information:
  1. A completed copy of the following Digital Measures reports: (a) Retention Reports, (b) Annual Activities Reports, and (c) Merit Reports for the relevant time frame. The faculty member may also be asked to submit a completed copy of the Department of Management Merit Evaluation Form for the most recent year. Exception: For tenure review, information provided shall include all relevant activities as a UW-La Crosse faculty member. The Department Chair will supply copies of the Merit Evaluation Form to faculty members.
  2. Copies of relevant published research and/or relevant documents must accompany the merit evaluation form.
  3. A professional development plan that outlines any efforts to improve, or initiatives in the areas of teaching, research and service for the next three years. This plan should include a three-year research agenda, updated annually to reflect accomplishments, as well as changes from the previous year's plan. Each year's plan is subject to review and modification by the candidate, in consultation with the PRT committee.
  4. A vitae that covers the period from date of hire at UW-La Crosse to the time of retention/tenure review. This vitae should employ subject headings consistent with the Department of management merit form headings for research and service. Special attention should be given to the provision of service information that may not normally be included in a vitae.
- iii. The Department Chair shall provide the Chairperson of the PRT Committee with the following information for each renewal (tenure) candidate:
  1. Student evaluations for each semester of teaching at UW-La Crosse. Information provided must include the fractional median for items 2-24 of the student evaluation questionnaire, the department fractional median for items 2-

- 24, and the composite results on individual items 2-24, and the ranking of the faculty in the department on these respective items.
  2. Grade distribution for each semester at UW-L.
  3. The detailed results of the merit evaluation process (merit point allocations by category) for each year in which the candidate was evaluated for merit purposes.
  4. Peer evaluation of teaching and any other information which could have a bearing on the evaluation of the faculty member.
- iv. The PRT Committee proceedings will normally be open; however, the committee may go into closed session to consider personnel matters. The decision to go into closed session should conform to relevant Wisconsin statutes (e.g., Wis. Stat. § 19.81 – 19.98).
  - v. The PRT members shall vote by signed ballot on a motion to recommend renewal of probationary appointment (tenure) after fair and full consideration to all relevant materials submitted by the candidate or on behalf of the candidate.
  - vi. Renewal (tenure) requires a two-thirds majority vote.
  - vii. The PRT Committee Chair shall assign a member of the committee to draft a letter recommending renewal (tenure) or non-renewal (non-tenure) which shall include the outcome of the vote.
  - viii. Within 7 days after completion of the review of a faculty member, a written report of the results of the review shall be given to the faculty member. Results shall be reported for each of the review areas. [UWS 3.06(3)(b)]
  - ix. In the event of non-renewal, a list of the reasons for non-renewal shall be drafted and held by the PRT Committee and is not transmitted to the renewal (tenure) candidate. Likewise, the list of reasons is not made a part of the candidate's personnel file unless the candidate requests the reasons for non-renewal (tenure).
  - x. A faculty member denied recommendation for renewal (tenure) may file a written request with the PRT Committee Chairperson asking for the reasons for not granting the recommendation.
  - xi. A faculty member denied recommendation for renewal (tenure) may file a written request with the PRT Committee Chairperson asking for a reconsideration meeting. The person who is requesting the reconsideration meeting may invite up to two observers to watch them present information to the committee and hear any questions asked or statements made by committee members to the appellant. The committee may also have up to two observers present. This is to insure that the appellant has an adequate opportunity to present information to the committee. (The observers do not speak or testify at the reconsideration meeting.) Thereafter, the committee may go into closed session consistent with relevant Wisconsin statutes for

the purpose of deliberation and decision-making. Within ten days of the hearing the observers should submit their individual written summaries of their observations to the committee, to the Human Resources department, and to any other relevant parties (e.g., the Complaints, Grievances, Appeals, and Academic Freedom Committee; CGAAF). All reconsideration procedures must conform to UW-L, and UW-System rules and the Administrative Code.

- xii. A faculty member who resigns will not normally be reviewed by the PRT committee.

### **C. Evaluation Criteria**

- i. The renewal (tenure) decisions by the committee shall be regarded as a peer judgment of future performance. The judgment each committee member must make is whether the renewal (tenure) candidate will be actively academically engaged in the future to warrant renewal (tenure). Consequently, in making a renewal (tenure) decision, the committee shall consider all work-related matters that have a bearing on the potential of the renewal (tenure) candidate.
- ii. The committee will review performance levels for renewal (tenure) candidates in the areas of Teaching, Research and Service prior to the renewal (tenure) decision. While unsatisfactory performance in any given area of review is unlikely to lead to a favorable renewal (tenure) decision, performance levels above a given minimum do not guarantee a favorable renewal (tenure) decision. Considerations that will guide committee members in their deliberations of candidate performance within these three areas are presented below.

**1. Teaching**—Teaching will be evaluated as a matter of peer review, in which SEI scores will play but one part among many in evaluating a probationary faculty member's teaching effectiveness. Along with consideration of student evaluation scores (SEI scores)—their values, their trends, and their variations, individually and comparatively within the department—other areas to be considered in an effective peer review include, but are not limited to:

- a. Most recent merit peer review
- b. Curriculum and course development
- c. Quality of syllabi, exams and assignments
- d. Innovative approaches to instruction
- e. Alignment between course objectives, teaching pedagogy and documented outcomes
- f. Teaching workload and course variety
- g. Maintenance of academic standards and integrity
- h. Preparation of materials employing various media for instructional use
- i. Grade distributions
- j. Student advising and counseling
- k. Supervision of student research and internships
- l. Attendance at workshops and seminars on teaching effectiveness
- m. Improvement of instruction grant application and funding

- 2. Research** - The candidate meets the CBA scholarly productivity guidelines (see CBA website) and has demonstrated an ongoing and credible commitment to scholarly research. The candidate initiates and maintains an active research program and asks research questions not only worthy of the field but also relevant to classroom instruction.

For faculty hired without a completed terminal degree (e.g., Ph. D., D.B.A., and J.D.) the primary goal should be to complete all outstanding degree requirements, including completion of the dissertation, if required. This goal should be accomplished during the first academic year. Failure to complete the dissertation during the first academic year may give rise to serious doubts as to the ability of the faculty member to do quality research expected of university faculty and may have implications on the extension of the third year contract.

For faculty hired with a completed terminal degree (e.g., Ph. D., D.B.A., and J.D.), the focus should be on actively engaging in quality research as soon as possible. Specific areas to be considered include, but are not limited to:

- a. Research grant applications and funding
  - b. Articles, books, and book reviews submitted and/or accepted by refereed and/or non-refereed journals
  - c. Working papers and research in progress
  - d. Papers presented at professional programs
- 3. University, Professional, Public Service** – Each year, over a three year period, the probationary faculty member should serve on at least four committees; two of which are at the departmental level, one of which is within the college, one of which is at the university level, The candidate should also attend at least six activities from among the following: attendance at professional meetings (workshops, seminars, etc.), discussion of papers at professional meetings, and service activities in a professional capacity. The committee also expects the faculty member under review to be able to explain “the value” they added in their respective service efforts. Specific areas to be considered include, but are not limited to:
  - a. Membership in professional organizations
  - b. Attendance at professional conferences
  - c. Participation as Discussant or Session Chair or Organizer at professional conferences
  - d. Attendance at institutes and seminars
  - e. Honors and awards
  - f. Speeches and workshops conducted
  - g. Consulting
  - h. Membership and offices held in community organizations
  - i. Participation in University Outreach Programs

- j. Faculty Senate and other University Committees
- k. Department Committees
- l. College Committees
- m. Department offices held
- n. Advisor to campus groups
- o. Building library resources
- p. Other services to University Programs

- iii. In evaluating a faculty member's performance, the committee will weigh the three areas as follows:
  - 1. Teaching: 40%
  - 2. Research: 40%
  - 3. Service: 20%
- iv. The committee shall also review renewal and required improvement letters from previous years.



## **XVI. Department of Management Rules for Promotion**

### **A. Overview**

- i.** The initial review for faculty eligible for promotion will be conducted by the Department's Promotion, Renewal, and Tenure (PRT) Committee.
- ii.** The promotion procedure and evaluation criteria for promotion (outlined below) are to be consistent with UW-La Crosse and UW-System policies and guidelines. If changes in those policies necessitate changes in any aspect(s) of this procedure or these criteria, the remainder of these Departmental rules will continue to be in effect.
- iii.** The review procedures are very similar to the review procedures for granting tenure as outlined in Section XIII above. Thus, these sections may be consulted for additional guidance.

### **B. Procedure**

- i.** The Department Chair will give written notice to those eligible for promotion (according to UW System and UW-La Crosse guidelines) of their eligibility and requesting a written response, indicating whether or not they wish to seek promotion that academic year. The written notice shall be given at least 20 days prior to the PRT review meeting and shall inform the candidate of the appropriate date by which this information must be submitted to the department PRT Committee. The written faculty response (and any below) must be given at least seven (7) days prior to the review.
- ii.** The faculty member seeking promotion shall provide the Chair of the PRT Committee the following information:
  - 1.** The faculty member should generate their Promotion Report in Digital Measures; this report should conform to guidelines created by the UW-L Joint Promotion Committee (JPC).
  - 2.** Any other relevant material requested by the Committee.
- iii.** The Department Chair will provide the Chair of the PRT Committee with the following information for each candidate for promotion
  - 1.** Results of the merit evaluation process.
  - 2.** Student evaluations for the last six semesters of teaching at UW-La Crosse (see tenure guidelines, above, for additional details).
  - 3.** Course syllabi from the Department Course Syllabi File.
  - 4.** The portion of the UW-La Crosse Promotion Candidate Evaluation Form that is "to be completed by the Department Chair."
  - 5.** Any other relevant information requested by the committee.
- iv.** The PRT Committee proceedings will normally be open; however, the committee may go into closed session to consider personnel matters. The decision to go into closed session should conform to relevant Wisconsin statutes (e.g., Wis. Stat. § 19.81 – 19.98). After consideration of the relevant information, the committee shall vote by signed ballot on a motion to recommend promotion. Promotion requires a simple majority. A tie vote, therefore, shall result in a failure to recommend promotion.

- v. For candidates receiving a favorable committee recommendation, the PRT Committee Chair will assign a member of the committee to complete a draft of the portion of the UW-La Crosse Promotion Candidate Evaluation Form that is “to be completed by the Department Promotion Committee.” The Department PRT Committee will review the draft, and if necessary, make changes. The goal should be to highlight the recommended candidate's strengths. If the Department Promotion Committee is not required to complete a portion of the UW-La Crosse Promotion Candidate Evaluation Form, then the Chair of the PRT Committee shall appoint a committee member to write a draft of a letter to the appropriate UW-La Crosse committee. The letter will describe the candidate's strengths in the area of teaching, research and professional service. The Committee will review the letter to make appropriate changes. The goal of the letter should be to highlight the recommended candidate's strengths.
- vi. For candidates receiving an unfavorable committee recommendation, the PRT Committee Chair will complete a draft of a letter to the candidate stating the outcome of the vote, giving reasons for the committee decision. The letter will also recommend actions the candidate might take to enhance his or her chances for the favorable decision in the future. The committee will review this draft and make appropriate changes. The goal should be to encourage excellent performance from faculty members so they may receive favorable promotion recommendations in the future.
- vii. Each faculty member seeking promotion for each level will be ranked within grade by the PRT Committee.
- viii. The ranking(s) and recommendations will be forwarded to the Department Chair with a letter informing the Chair of the order and the justification for the order.
- ix. Candidates have the right to appear before the PRT Committee on their own behalf and to speak to the Department on their own behalf.
- x. Candidates for promotion will not be allowed to participate in the committee action, regarding candidates at the rank.
- xi. The list and rankings of candidates (with files of accompanying documentation) will be forwarded to the Dean's office.
- xii. A faculty member denied recommendation for promotion may file a written request with the PRT Committee Chairperson asking for a reconsideration meeting. The person who is requesting the reconsideration meeting may invite up to two observers to watch them present information to the committee and hear any questions asked or statements made by committee members to the appellant. The committee may also have up to two observers present. This is to insure that the appellant has an adequate opportunity to present information to the committee (The observers do not speak or testify at the reconsideration meeting). Thereafter, the committee may go into closed session consistent with relevant Wisconsin statutes for the purpose of deliberation and decision-making. Within ten days of the hearing the observers should submit their individual written summaries of their observations to the committee, to the Human Resources department, and to any other relevant parties (e.g., the Complaints, Grievances, Appeals, and Academic Freedom Committee; CGAAF). All

reconsideration procedures must conform to UW-L, and UW-System rules and the Administrative Code.

### **C. Evaluation Criteria**

- i. Faculty are eligible to be promoted from the rank of Assistant Professor to Associate Professor or from the rank of Associate Professor to (full) Professor. Eligibility requirements are determined by the Department as well as by UW-System and UW-La Crosse. Other criteria for eligibility and categories of promotion may also be determined by UW-La Crosse and UW-System.
- ii. Department eligibility requirements for promotion from Assistant Professor to Associate Professor are as follows:
  1. Teaching - The same evaluation criteria as used for retention (tenure) also apply here (see Section XIII, C).
  2. Professional and Public Service - At least five from among the following: attendance at professional meetings (workshops, seminars, etc.) discussion of papers at professional meetings, reviewing papers for journals, involvement in scholarly and professional societies, and/or public service activities in a professional capacity (e.g., presentations or assignments with the Small Business Development Center (SBDC), or assisting businesses or nonprofit organizations).
  3. Department, College, University and UW-System Service membership for a total of at least 75% of the semesters that they have been in service at UW-La Crosse from among any of the following: Standing committees, significant ad hoc committees, UW-La Crosse Faculty Senate, serving as an external reviewer for faculty seeking promotion or tenure at other universities and/or serving as a member of graduate thesis or dissertation committees.
- iii. Satisfaction of the minimum performance levels does not guarantee a favorable promotion recommendation. Once a faculty member has met the minimum criteria in each area, the committee encourages promotion candidates to emphasize those areas in which their greatest interests or strengths lie and to encourage high quality work within those areas. However, in evaluating a faculty member's performance in excess of the minimum levels, the PRT Committee will weigh the four areas approximately as follows:
  1. Teaching - 40%
  2. Research - 40%
  3. Service - 20%

This weighting scheme is a statement of values adopted by the PRT committee and may or may not be identical to the values of the appropriate UW-La Crosse Committee. In addition, the Department PRT Committee expects a candidate to excel in either (a) teaching or (b) research or (c) both.

## **XVII. Post-Tenure Review of Faculty**

In accordance with UW System requirements, tenured faculty will be reviewed on a five-year cycle. The department recognizes that faculty work post-tenure may be quite different from work done pre-tenure. For example, post-tenure faculty may explore more controversial topics or emerging directions of scholarship. When reviewing post-tenure activities the department and post-tenure review committee will recognize these differences. The department follows the UWL procedure and schedule regarding post-tenure review <https://www.uwlax.edu/human-resources/post-tenure-review-policy/>. UWL's policy was approved by the UW System Board of Regents in November 2016.

**A. Retention Criteria.** In order to obtain a recommendation for re-appointment, the faculty member's performance must be evaluated to be meeting department expectations for a tenured faculty member. Performance criteria are stated and detailed below. The members of the Post Tenure Review Committee shall use the electronic portfolio to judge each faculty member's performance in the areas of teaching, scholarship, and service. Minimal standards are described below:

**i. Scholarship:** Faculty recommended for post tenure retention will show evidence that they are meeting satisfactory contributions for post tenure scholarship. Satisfactory contributions include any of the following: adhering to CBA Scholarly productivity guidelines, attendance at conferences, making presentations, publications, sustained scholarly progress, mentoring undergraduate/graduate research, submitting grants, etc.

**ii. Service:** Faculty recommended for post tenure retention will show evidence that they are meeting satisfactory contributions for post tenure service. Satisfactory contributions include participation in at least two the following service areas on a consistent basis: (departmental, college, university, community, professional).

**iii. Teaching:** Faculty recommended for post tenure retention will show evidence that they are meeting satisfactory contributions for post tenure teaching. Satisfactory contributions include any of the following: (e.g., evidence of satisfactory teaching such as satisfactory SEI scores and/or peer evaluations of teaching, evidence of and commitment to continuous improvement in teaching, keeping up-to-date in the field, holding regular office hours).

**iv. Professionalism:** The members of the Department believe we have established a tradition of civility and professionalism among our members and that is essential for all faculty and IAS to recognize and contribute to this tradition. While teaching, research/scholarship, and service contributions are primary indicators of professional success, we also recognize the role of professionalism/civility as a critical part of the review process. Professionalism is defined as the manner and process in which work-related duties are executed in the workplace.

**Scoring.** Based on the retention criteria, each Post Tenure Review Committee member will assign an overall evaluation to each individual using the Post Tenure Review Evaluation Form (Appendix D). The overall evaluation score is based on the teaching, research and service expectations of the department. The possible overall evaluations that can be assigned are: "Meeting" or "Not-Meeting", department expectations.

The faculty member will be assigned the highest overall score (Meeting or Not-Meeting) given by one half or more (simple majority) by the Post Tenure Review Committee.

<https://www.uwlax.edu/human-resources/post-tenure-review-policy/>

## **XVI: Retention and Evaluation of Academic Staff**

These bylaws establish the procedures and criteria for instructional academic staff evaluation and progression.

### **A. Ad hoc IAS Review Committee(s):**

- i. All academic staff must be evaluated on an annual basis as specified in the *UW-L Staff Handbook*. The Instruction Academic Staff (IAS) review will be conducted by a three-member ad hoc committee consisting of the following: (1) the Department Chair, (2) one tenured faculty member from within the Department, and (3) one IAS member from the UW-L College of Business Administration who is either at the rank of “Lecturer” or “Senior Lecturer” (or equivalent). The IAS undergoing review and the Department Chair should agree, in advance, upon the tenured faculty member and IAS member who will participate in the review. If they cannot agree, or if the Chair is unable to secure sufficient personnel, then the Dean’s office will be asked to appoint someone to serve. (Note that membership on this ad hoc committee may vary for each IAS member being reviewed.) This committee will henceforth be called the ad hoc IAS Review Committee.
- ii. The ad hoc IAS Review Committee(s) will conduct reviews for retention, merit, and promotion recommendation purposes. All committee members will vote. No IAS member may vote on their own evaluations.
- iii. The Department Chair will chair and convene each ad hoc IAS Review Committee.

### **B. Annual Review**

- i. In accordance with Faculty Personnel rules UWS 3.05-3.11 and UW-L 3.08, instructional academic staff will be evaluated annually for both evaluative and developmental purposes. Merit recommendations will also be included in this review.
- ii. Prior to the review date specified by the ad hoc IAS Review Committee, all IAS under review will provide an electronic portfolio related to their teaching, service, and professional development; scholarship may also be considered. Hyperlinked syllabi should be provided and the IAS member may provide additional evidence if they so desire.
  - a. At least 20 calendar days prior to the review, the Department Chair will give written notice of the review.
  - b. This evaluation should take place between May 15 and November 15 each year (after Spring Semester Student Evaluation of Instruction (SEI) results are available). The evaluation period will be for the previous academic year.
- iii. The Individual Development Plan (IDP)/Performance Appraisal & Review.

- a. The IDP form (which includes an Annual Review Checklist, to be used by the Review Committee) can be found in Appendix E. The form may be adapted to fit specific duties of individual IAS.
- b. At the time of the review an IDP form, reviewing the past academic year, and setting goals for the upcoming/current academic year will be jointly created by the IAS member and the ad hoc IAS Review Committee.

### **C. Evaluation criteria**

- i. IAS will be evaluated on the basis of their position description as well as the existing IDP, if available.
- ii. In addition, all IAS will be expected to meet standards of professional qualification according to the guidelines set by the UW-L College of Business Administration (typically found on the CBA website).
- iii. IAS activities should be reviewed according to the individual's position description. In many cases IAS are expected to devote approximately 75% of their time and effort to Teaching with the remaining 25% to Service/ Professional Development/Scholarship (combined). While IAS are encouraged to take part in research, scholarship is not required for effective or meritorious performance and, for purposes of promotion, cannot take the place of effective teaching. If the ratios above are reallocated in advance by the College, University, or by the Department Chair, review of IAS in each of these areas should be weighted accordingly. CBA productivity guidelines should also be discussed at the time of review.

### **D. Rating Process**

- i. Prior to the meeting, each voting member will evaluate the electronic portfolio and submit to the Department Chair their performance and merit ratings and optional comments. Each member of the ad hoc IAS Committee will have an equal vote.
  - a. Ratings will be made for the areas of (1) Teaching, and (2) Service/Professional Development/Scholarship (combined). While IAS are encouraged to take part in research, scholarship is not required for effective or meritorious performance (and, for purposes of promotion, cannot take the place of effective teaching). Ratings will be made for both performance review and merit recommendations.
  - b. Committee members who have a conflict of interest should abstain from making ratings in those areas where such conflict exists.
  - c. The Chair will compile the category scores, apply appropriate performance category weights determined by the position description and IDP to the average rating, and calculate a preliminary overall rating for the IAS candidate under review.
- ii. After these scores have been compiled and ratings have been computed, the Chair will either distribute the results to the committee members prior to the committee meeting or bring them to the meeting.
  - a. The Committee will meet with the IAS candidate under review. The prior year's performance ratings and merit ratings will be reviewed.
  - b. Goals will also be jointly set with the IAS candidate for the upcoming year.

### **E. Transmission Process.**

- i. The committee's final ratings will be recorded in an evaluation report.
- ii. Final category scores will be used for establishing the goals for the IDP for the upcoming year.
- iii. A copy of each report and all other documentation regarding the process will be forwarded to the Dean's office and to HR.

#### **G. Promotion Procedures**

- i. Promotion procedures must conform to UW-L and UW-System policies and procedures; for details, see the UW-L Human Resources website.
- ii. To be considered for Promotion, IAS must submit their Promotion Portfolio electronically to the Department Chair on or before the specified due date. The Department Chair will provide a written 20-day notice prior to the due date.
- iii. The ad hoc IAS Review Committee will review the promotion portfolio, keeping in mind that this is a peer judgment of future performance. After the IAS Review Committee has completed its review, it will provide a recommendation. The Department Chair will provide a letter of support for the university IAS Promotion Committee, forwarded to the CBA Dean's office.
- iv. To be considered and recommended for promotion, a candidate should exhibit excellence in teaching and be engaged in professional development/scholarship, and service.
- v. Professional development activities may include, but are not limited to, those activities that can be shown to relate to the IAS member's teaching or service responsibilities, such as any of the following: participation in workshops, institutes, seminars, teaching graduate courses, participation in professional organizations or attendance at professional meetings.
- vi. Scholarship activities include, but are not limited to, the following: articles, books, and book reviews submitted and/or accepted by refereed and/or non-refereed journals, papers presented at professional programs, research grant applications and funding, working papers. Research in progress may also be considered.

**vii.** Service activities fall into two categories, professional service and university service. The activities to be considered include, but are not limited to:

**a. Professional Service**

1. Participation as Discussant, Session Chair or Symposium Organizer at professional conferences
2. Offices held in community organizations or professional societies in a professional capacity
3. Speeches and workshops conducted
4. Consulting (both paid and unpaid. *Note:* Consulting should not interfere with one's duties at UW-L).
5. Attendance at professional conferences
6. Attendance at institutes, professional workshops, and seminars
7. Participation in University Outreach programs
8. Membership in organizations in a professional capacity
9. Honors and awards

**b. University Service**

1. University and UW-System committees
2. Department committees
3. College committees
4. Advisor to campus groups
5. Other services to the university

**viii.** All activities required to meet the standard of professional qualification according to the guidelines set by the College of Business will be considered for Promotion.

## **H. Appeal Procedures**

- i.** When the IAS member does not agree with the annual review, merit, or promotion decisions they have the right to appeal this decision. They may appeal the decision to the full Department of Management PRT Committee. Typically, the aggrieved employee will present their case; then members of the ad hoc IAS Review Committee will present their case. All members of the PRT Committee who did not serve on the ad hoc IAS Review Committee will then decide whether to uphold or adjust the IAS Review Committee's decision.
- ii.** In the case of a tie vote, the decision of the IAS Review Committee stands. If the grievant is still dissatisfied with the outcome, the grievant may pursue the grievance further using UW-L procedures (see the UW-L Human Resources website for details).



## **XVII: Appeal Process for the “Final Grade” Changes**

### **A. Procedures**

- i. The process of appealing a final course grade should start with a formal filing by the student with the department Chair within four (4) weeks of regular semester days after viewing the final course grade.
- ii. The student and the instructor (instructors in case of team instruction) should meet informally to discuss the issues within 2 weeks of filing an appeal.
- iii. If the student and the instructor agree to a grade change, then the new assigned grade is changed by the instructor using the appropriate final grade change form. If the student and the instructor are unable to reach an agreement, the student files a petition in writing with the Department Chair within 2 weeks of meeting with the instructor. The petition must contain all the supporting documents.
- iv. Department Chair designates an ad hoc departmental committee of two faculty members, preferably, of the same area of teaching as the instructor, within two weeks of receiving the appeal. The Department Chair also designates a Convener. The Chair serves as an ex-officio member who casts a vote in case of a tie.
- v. The committee typically asks the student to present their case with the appropriate documentation and portfolio. The instructor presents their case to the committee in a separate hearing. The committee may conduct a joint hearing if both the parties agree to such an arrangement. Open Meeting statutes of the State of Wisconsin will govern all the hearings (e.g., Wis. Stat. § 19.81-19.98).
- vi. The Committee makes a recommendation of the change of grade to the Chair based upon its finding. The Committee should conduct its hearings and meetings in a timely fashion so as to complete formulating its recommendation within 4 weeks of receiving charges from the Chair.
- vii. The Chair of the Department of Management inform the parties (student and instructor) in writing of the recommendation made by the Committee within 1 week of receiving the recommendation. The final decision made by the Chair of the Department is based upon the Committee’s recommendation and is binding on both parties.
- viii. The Chair then proceeds to change the grade (if appropriate) on the final grade change form within 1 week of communicating to the parties the outcome of the ‘grade change’ decision.

### **B. Amendment to the Process**

This grade appeal process can be amended by a simple majority vote of the Department members. However, a six month waiting period will be applied for implementing the changes in the process. The six-month waiting period can be waived (suspended) only by a two-thirds (2/3rds) vote of the Management Department faculty.

### **XVIII. Amendment & Suspension of Department Bylaws**

Department bylaws can be **amended** by a simple majority vote of the eligible Management Department faculty. Amendment of bylaws requires a six-month waiting period before the changes go into effect. The six-month waiting period can be waived (**suspended**) by a two-thirds (2/3rds) vote of the Management Department faculty. Specific provisions of the bylaws can be **suspended** only by a two-thirds (2/3rds) vote of the Management Department faculty.

## **Appendix A**

### **Responsibilities of Departments, Department Members, and Department Chairpersons**

On April 14, 1994, the Faculty Senate approved this section as a UW-L Bylaw governing departments and department members. It also appears in the UW-L Staff Handbook. Faculty are organized on the basis of their disciplines into departments. The faculty carry out the responsibilities of the department through their creative and other contributions in the areas of teaching, scholarship and service.

- A. The primary function of a department is to teach in its discipline(s). The key teaching responsibilities of the department and its members include:
  - 1. Maintaining a faculty collectively expert in the breadth and depth of their disciplines(s).
  - 2. Keeping abreast of the subject matter of their discipline(s) and incorporating this matter into courses.
  - 3. Continually assessing courses and curriculum to recommend and implement suitable revisions including consideration of interdisciplinary offerings.
  - 4. Keeping current on and developing new ways of teaching and learning in the discipline(s), including the use of appropriate technology.
  - 5. Reviewing, developing and expanding library holdings to ensure coverage of the discipline.
  - 6. Continually relating the substance of the discipline(s) to the needs and interests of the general students, the potential specialist, and the community.
  - 7. Assessing the effectiveness of departmental instruction.
- B. The department is responsible for promoting scholarship and creative activities. Scholarship responsibilities of the department and its members include:
  - 1. Making contributions of scholarly and other creative activities in the discipline(s).
  - 2. Providing the opportunity for and supervising the scholarly activities of undergraduate and graduate students.
- C. The department is responsible for promoting the continued professional growth and development of its members by encouraging their participation in sabbatical leaves, developmental leaves, conferences, professional workshops and other similar programs.
- D. The department is responsible for utilizing the expertise and interest of its members to provide professional service. Service responsibilities of the department and its members include:
  - 1. Contributing to the university through participation in faculty governance or other university service.
  - 2. Actively participating in the functions of the department.
  - 3. Contributing to and participating in professional organizations.
  - 4. Utilizing their professional expertise and interest through participation in community and other organizations.
- E. The department is responsible for advising students and providing students opportunities to develop and grow outside the environs of the classroom. The department and its members are responsible for:

1. Providing advising on academic program requirements and presenting the array of available career opportunities.
  2. Affording the student the opportunity to learn outside the classroom, through internships, cooperative agreements and other mechanisms (such as visiting scholars programs).
  3. Encouraging and advising organizations for majors and other students interested in the discipline.
- F. The department is responsible for providing an internal governance structure in which the functions of the department can take place. The department and its members are responsible for the following:
1. Establishing departmental bylaws that define the responsibilities of the department members and the Chairperson in accordance with the UW-System and UW-L policies.
  2. Selecting the Department Chairperson (according to UW-L guidelines). The department delegates authority to the Chairperson consistent with Section H of this bylaw and consults with the Chairperson on department matters.
  3. Working with its Chairperson, through regular department meetings and committee assignments, to formulate and carry out policy.
- G. The department is responsible for making personnel decisions.
1. The department shall establish personnel bylaws.
  2. These bylaws shall specify requirements for retention, tenure, promotion, tenured faculty review and development, and the distribution of funds allocated in the department for salary adjustments or summer salaries. These bylaws shall comply with UW-System and UW-L Faculty Personnel Rules.
  3. The department shall make these bylaws available to its members. Notification of any changes in bylaws must be provided to all members within 14 days.
- H. The Chairperson is generally responsible for ensuring that the policies and procedures of the department are carried out in accordance with the departmental bylaws and that the department and its member are fulfilling the responsibilities described in “A” through “G” above. The Chairperson shall assume a prominent role in creating a professional environment conducive to high morale and productivity in the department. Specific department functions supervised or performed by the Chairperson include:
1. Registration and Scheduling
    - a. Developing semester and summer session class schedules in consultation with the faculty.
    - b. Monitoring registration and assessing the need to add or cancel classes.
  2. Curriculum
    - a. Implementing the authorized curriculum; initiating discussion of curricular issues; developing proposals for new or revised courses, special projects, grant proposals, curriculum changes; arranging for textbook selection; and participating in the presentation of departmental proposals before the appropriate committees.
    - b. Receiving and responding to concerns about curriculum and acting on substitution and waiver

requests brought by students and others.

3. Budget, Textbooks, Equipment and Facilities

- a. Preparing the annual departmental budget for travel, services, supplies and equipment; ordering all budgeted items; and managing expenditures in accordance with the budget plan.
- b. Making recommendations for textbook and library budgets and other budgets as requested.
- c. Reporting textbook choices to the Textbook Rental Services in timely fashion.

4. Meetings and Committees

- a. Establishing a schedule of departmental meetings and presiding at same.
- b. Ensuring that departmental committees are meeting to fulfill their responsibilities.
- c. Attending meetings of appropriate departmental, college and university committees.
- d. Designating or recommending department members to serve on committees as requested.
- e. Arranging for representation and participation of the department at professional meetings and placement centers as appropriate.
- f. Serving on committees as requested.

5. Personnel

- a. Conveying to the appropriate administrative officer the personnel needs of the department for faculty and academic staff, graduate assistants, classified staff and student help.
- b. Monitoring all departmental search and screen activities for compliance with UW-L Affirmative Action hiring procedures.
- c. Describing and publicizing faculty and academic staff vacancies and corresponding with applicants and placement agencies; scheduling and participating in interviews; making recommendations to the appropriate administrative officer regarding hiring; and providing orientation for new members regarding departmental policies and procedures, departmental expectations for faculty and academic staff, and faculty and academic staff responsibilities.
- d. Arranging for the required evaluations of faculty and academic staff; scheduling student evaluation of department members; monitoring department personnel committees with regard to conformance with UW-System, and UW-L department procedures; and informing individual members of any recommendations regarding them.
- e. Describing and publicizing graduate assistantship positions; making recommendations to the appropriate administrative officer regarding hiring of graduate assistants; providing orientation and assignment for graduate assistants; and participating in the evaluation of graduate assistants.
- f. Arranging for the selection, hiring, training, overseeing, and evaluation of classified staff and student help.
- g. Recommending summer school appointments to the appropriate administrative officer within university, college and departmental guidelines.
- h. Ensuring the continuation of classes during prolonged faculty absences.

6. Students

- a. Receiving and responding to student questions, concerns, and complaints regarding courses, curriculum requirements, faculty and grades.
  - b. Coordinating advising activities for the department.
7. Teaching
  - a. Teaching a reduced load in the department in accordance with UW-L Law IXB (see the Staff Handbook).
8. Other Responsibilities
  - a. Responding to inquiries from the university, the UW-System, and external accrediting agencies regarding department programs.
  - b. Conferring, as needed, with other Chairpersons in the university and with other departments of the same discipline in the system and area.
  - c. Corresponding with prospective students, teachers, and the general public on their inquiries.

## **Appendix B**

### **Department Statements on Teaching, Research and Service**

#### **Department Statement on Scholarship**

The Department supports a broad view of scholarship that emphasizes keeping current in the discipline, acquiring and advancing knowledge, and incorporating new knowledge into teaching on a regular basis. The Department generally accepts the characterization of scholarly activity offered by the AACSB.

Scholarly activity may include, but is not limited to the following:

- Basic and applied research
- New applications of existing knowledge
- Integration of knowledge
- Scholarship of teaching and learning (e.g., development and/or analysis of pedagogical methods)

**Behavioral Guidelines:** Faculty are expected to actively engage in ethical research practices in fields relevant to their field of study. Faculty who are engaged in empirical research are expected to obtain approval and following the protocols as determined by the Institutional Review Board (IRB) for the Protection of Human Subjects.

**Expectations:** The Department expects that successful candidates for retention, tenure, and promotion as well as for meritorious performance evaluations have a record of ongoing scholarly activity that EXCEEDS the AACSB Scholarship & Practitioner Productivity Guidelines & Faculty Qualifications. The department generally categorizes scholarship into two groups, consistent with the CBA Guidelines for Maintaining Scholarly and Professional Qualifications<sup>1</sup>. Contributions in Group 1 are considered higher impact than items in Group 2. Within Group 1, contributions are ranked according to tiers as a means of indicating more specifically levels of impact or rigor, and also to guide extra meritorious designation.

#### *Group 1: Peer Reviewed Intellectual Contributions*

Peer-reviewed academic journal publications and conference proceedings, publication of a first-edition book and receiving highly competitive external grant awards make up Group 1. The tiers of this group are intended to further classify peer-reviewed academic journal publications, and are based on the most recent available Australian Business Deans Council (ABDC) journal quality list.

- Tier 1: Peer-reviewed academic journal publications with A or A\* ranking from ABDC.
- Tier 2: Peer-reviewed academic journal publications with B ranking from ABDC; publication of a first-edition scholarly book or textbook by a regionally, nationally, or internationally recognized publisher
- Tier 3: Peer-reviewed academic journal publications with C ranking from ABDC;
- Tier 4: Conference proceedings that are peer-reviewed and include a complete manuscript that is published, circulated and publicly available.
- Grants will be considered on a case-by-case basis to determine the appropriate tier classification based on award size and level of competition (e.g., as shown through the peer review process).

In instances where the peer-reviewed publication is not on the ABDC list, it is incumbent upon the faculty member to present supporting evidence to justify the classification of that particular publication. We encourage faculty to explore the journals they are publishing in to ensure that they are not predatory journals. Predatory journals are given minimal credit.

#### *Group 2: Other Intellectual Contributions*

All intellectual contributions in relevant scholarly activity not included in Group 1 make up Group 2. The contributions in this group are not tiered. Such contributions include (but are not limited to):

- Presentation of scholarly work at a regional, national, or international academic or practitioner conference
- Publication of an original book chapter, book review, or study guide
- Invited seminar presentation of scholarly work at an academic or research institution
- Publication of a non-refereed journal article
- Awarded a small or less competitive external grant for scholarly work (not included in Group 1)
- Awarded a competitive UWL grant for scholarly work
- Delivering scholarly symposium or workshop
- Publication of a second-edition or later scholarly book or textbook by a regionally, nationally, or internationally recognized publisher
- Self-publication of a first-edition scholarly book or textbook, or publication of a first-edition book or textbook by a publisher not recognized in Group 1

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<sup>1</sup> <https://www.uwlax.edu/globalassets/academics/colleges-schools/cba/selected-documents/scholarlyproductivityqualifications09032020.pdf>

- Other significant research projects that have been publicly disseminated and have documented impact

The intellectual contributions specifically referenced in this statement on scholarship do not represent an exhaustive list. If a contribution is not addressed in this statement, the individual faculty is responsible for making a case for its most appropriate categorization and, if relevant, tier.

Extra-meritorious activity for research would be scholarly activities that go above and beyond the normal expectations of research in a given annual review period in terms of quantity, impact, workload requirement, and/or leadership (e.g., one or more Tier 1 contribution from Group 1 *or two* or more Tier 2 contributions from Group 1, or some combination of Tiers in Group 1 and activities in Group two that are equivalent to a Tier 1 contribution). Publications are counted in the academic year of publication -- on-line or hard-copy-- and not in the academic year they are accepted for publication.

### **Department Statement on Service**

The Department upholds the belief that a well-rounded academician is a teacher who also pursues scholastic and service activities. Theorists (such as Boyer, 1994) have argued that service is particularly important in higher education because colleges and universities need to respond to the challenges that confront society. In terms of how service relates to scholarship and teaching, Lynton (1996) suggests that these three components that comprise the triad of academic activity should be seen “as a continuum along which basic and applied research overlap and merge into application and related forms of outreach, which in turn almost inevitably include a formative component that melds into organized instruction (p. 17-18).” Additionally, service is a key component to faculty governance and to supporting effective functioning of the department, college and university so the mission of UWL can be upheld.

**Behavioral Guidelines:** Faculty are expected to be actively engaged in service in a collegial manner as evidenced by regular attendance and participation on committees and/or positions of leadership, as well as engagement in professional service. While there are a variety of service opportunities available to faculty, it is expected that in most years faculty members will actively advise an appropriate share of management advisees; represent the department on a standing CBA committee and/or serve on two departmental committees if asked or eligible; and play an active role on at least one university committee when selected.

**Evaluation Criteria:** When evaluating the work of faculty, the department particularly values service that can support and enhance the department and/or university, benefit the community, be incorporated back into the classroom and/or enhance scholarly activities. UWL gives more weight to service that is related to the candidate’s professional discipline and the department is likely to weigh service work more heavily if the individual has played a key role on the committee or contributed heavily to an activity. Faculty should document and provide evidence of contributions in service. Finally, evidence of the service work’s links back to the classroom and/or scholarship is particularly encouraged (e.g., a practitioner’s work serves to enhance class examples and case studies; informs research).

Service examples include, but are not limited to:

- Serving on a committee or in a leadership or membership role for some department, college, university, professional or community organization.
- Obtaining service-related grant funding and demonstrating the impact of the project
- Organizing or significantly contributing to extracurricular programming (e.g., workshop, speaker/film/conference moderation or program development, fundraising)



- Significant work coordinating a minor or program
- Significant work or leadership in curricula redesign, assessment or other needed programmatic activities.
- Chairperson, director and/or leadership activities in the Department, College, University or professional associations
- Community education on department related topics
- Editorial service to professional journals
- Engaging in peer review for retention, tenure, and post tenure review processes
- Evaluating manuscripts for professional publications
- Membership on boards, commissions, task forces, projects and/or special assignments in the college, university or university system
- Membership on departmental, college, university or professional association committees
- Office holding in professional associations
- Other contributions of clear value to the university, community and/or profession
- Professional consultant or advisor to boards, committees, commissions, task forces, community organizations and governmental agencies, or businesses
- Public speaking related to the faculty member's areas of professional expertise
- Social service to boards, committees, commissions, institutes, task forces, community agencies and organizations related to the faculty members' area(s) of expertise
- Writing guest editorials and granting media interviews in areas related to the faculty members' area(s) of expertise

In defining service, the department considers the three traditional categories within service: university service, professional service, and community service. Within these categories, contributions are organized by group level (Group 1, Group 2, Group 3). Contributions in Group 1 are considered higher impact than those in Group 2, which are considered higher impact than those in Group 3. These groupings are also used to guide extra meritorious designation.

University service: involves work on university, college and departmental committees, task forces, and special projects for the University, college and/or department. This is the primary source of service work as it is necessary to the effective functioning of the institution and needed to maintain legitimate faculty governance.

- Group 1 Service - typically includes service on committees at any level, standing or ad hoc, that meet two or more times each month, that average more than 15 hours of meeting time in a given semester and/or includes a significant amount of work outside the meeting times to complete committee charges. (Note that this may vary between semesters for the same committee). Group 1 Service also includes university service, not on committees, that meet these criteria. Committees that require a greater time commitment in one semester than in the other may properly be listed as Group 1 service in the more demanding semester. Examples include, but are not limited to:
  - Faculty Senate
  - Joint Planning and Budget Committee
  - CBA Steering Committee
  - Management PRT committee
  - Joint Promotions Committee
  - UWL Scholarship Committee
  - Chairing a Group 2 committee
- Group 2 Service - UWL, College and Departmental committees that do not qualify as Group 1

committees are presumed to fall in this group.

- Group 3 Service – Service in this group is valued by the department, but might not fall into the committee-type of service, meet more infrequently or require less time to complete the work, etc. (e.g., adviser for a student organization, supervised an independent study). This list is not exhaustive, and any similar service performed should be included.

Professional service: involves the use of a faculty member's professional expertise in a service activity that may be internal or external to the University. Such service activities can vary greatly, and should be described according to time commitment, content of contribution and impact of contribution in Digital Measures. Examples include, but are not limited to editorial work, ad-hoc reviewer, Chair or committee member for a professional association, Session Chair or reviewer for a professional conference, sharing professional expertise with one's professional organization(s), etc.

- Group 1 Service - typically includes service to professional organizations or activities, pro-bono, that meet two or more times each month, that average more than 15 hours of meeting time in a given semester and/or includes a significant amount of work outside the meeting times to complete professional service work.
- Group 2 Service – typically includes service to professional organizations or activities that are not as extensive as Group 2 Service work, but still require a moderate amount of time and that utilize one's professional expertise (e.g., reviewing journal manuscript(s), serving on a professional board or committee that meets infrequently, etc.).
- Group 3 Service – Service in this group is valued by the department, but is less time-intensive and yields a smaller impact than service listed in Groups 1 and 2. This may include a one-off service activity, or service in name but not practice (e.g., be an editorial board member, but not engage in any journal review activities, include paid professional service, etc.). This list is not exhaustive, and any similar service performed should be included.

Community service: involves applying the faculty member's professional expertise in a volunteer, civic or community related capacity. Such service activities can vary greatly, and should be described according to time commitment, content of contribution and impact of contribution in Digital Measures.

- Group 1 Service - typically includes service to community organizations or activities, pro-bono, that meet two or more times each month, that average more than 15 hours of meeting time in a given semester and/or includes a significant amount of work outside the meeting times to complete professional service work.
- Group 2 Service – typically includes service to community organizations or activities that that are not as extensive as Group 1 work, but still require a moderate amount of time and that utilize one's professional expertise (e.g., serving on a community board or committee that meets infrequently, volunteering time with a non-profit, etc.).
- Group 3 Service – Service in this group is valued by the department, but is less time-intensive and yields a smaller impact than service listed in Groups 1 and 2. This may include a one-off service activity, or service in name but not practice (e.g., science fair reviewer, speaker in a high school class on management-related topic, etc.). This list is not exhaustive, and any similar service performed should be included.

Extra-meritorious activity in service would be service that makes notable contributions to UWL, the CBA, the department, the profession, and/or the public that goes above and beyond the normal expectations of service work, in impact, workload requirement, and/or leadership. At least one contribution within the annual review period should be a Group 1 form of service.



## Department Statement on Teaching

When evaluating the teaching work of faculty, the Department considers examples of teaching activity such as those enumerated below as the fundamental aspect of the work of a faculty member at UWL. While we recognize that individuals have different talents and objectives within the classroom, we want our faculty to strive to articulate and achieve student learning outcomes. Furthermore, we see this process as ongoing and expect our faculty to continually examine their objectives and teaching strategies in this light.

**Behavioral Guidelines:** Faculty members are expected to comply with the following behavioral expectations:

- Hold class as scheduled in the timetable
- Conduct rigorous classes
- Ensure currency of courses
- Maintain appropriate grade distributions in line with the departmental norms
- Hold a reasonable number of office hours to accommodate student needs
- Select appropriate published teaching materials (e.g., textbooks, articles, cases)
- Develop and use appropriate syllabi, tests, written assignments, and supplementary handouts
- Adequately prepare for class and use appropriate classroom pedagogy
- Respect the dignity of students by providing fair and equitable treatment
- Create and maintain an inclusive learning environment
- Utilize relevant technology to support student learning
- Actively and effectively advise students by being available to advisees, and remaining current and accurate in knowledge of university policies and curricula

### Evaluation Criteria:

The primary objective of teaching is student learning. The Department recognizes effective teaching as the development and implementation of courses, materials, experiences, and an environment that enhances student learning. This involves both creating an effective learning environment for students and also continuous development of one's own knowledge and skills and an instructor. Effective teaching can be thought of in terms of the instructional strategies used (e.g., organization and structure, inclusive practices and classroom culture, effectively using feedback to guide student learning, and integrating appropriate technology and tools). Effective teaching can also be thought of in terms of an underlying process of utilizing evidence to inform practice, designing courses and materials according to learning objectives/goals, and continuous improvement of one's own pedagogy and practices. The Department recognizes that many different pieces of evidence can and should be used to demonstrate effective teaching.

Criteria used to evaluate teaching and expectations for meritorious as well as extra-meritorious teaching are outlined below. Extra-meritorious activity in teaching would include evidence of exemplary performance in multiple elements that make up teaching performance. **To be considered for extra-merit in teaching, one must have documented evidence of the required meritorious teaching activities and also evidence of engaging in at least four of the additional activities listed at the extra-meritorious level.** Thus, demonstrating that one's teaching activities go above and beyond the normal expectations of teaching work in terms of impact, workload requirement, and/or leadership.

Teaching Effectiveness Criteria	Expectations for Meritorious	Expectations for Extra-Meritorious
1. Foundational course content materials (i.e., syllabi, required	Syllabi and course calendars with clearly defined course goals and expectations, aligned with current UWL Faculty Senate	Required

resources, and course calendars)	syllabus requirements and the course CIM.	
<b>2. Assurance of learning program</b>	Evidence of a clear assurance of learning program, including a description of steps taken to evaluate student learning and improve one's teaching (e.g., changes resulting from evidence gathered on student learning, changes informed by pedagogical/andragogical research, changes informed by participation in workshops or instructional development grants).	Evidence of the more than the expected amount of assessment of student learning activities and modifications associated with assessment results. <i>Examples include:</i> (1) using data from direct assessments, modifying instruction based on those data, and reflecting on the results, (2) conducting more than the expected amount of assessment data and follow-up in a given year, and (3) external review of assessments from a peer, etc.
<b>3. Evidence-based class materials</b>	Class materials (e.g., activities, examinations, essays, projects, etc.) are based in research evidence of effective student learning and primary evidence gathered/analyzed by the instructor. Such evidence is expected to be documented in Digital Measures.	Required
<b>4. Student evaluations, commentary, and feedback</b>	We consider feedback from students as a valuable perspective on teaching effectiveness, while also acknowledging that student evaluations should not be interpreted without context (e.g., specific questions responded to, students' motivation to take the course, 'one off' comments vs. persistent themes of comments across students/courses, and grade distributions for the course). Faculty should reflect on persistent themes from student feedback across courses and over time. Weight should be given to student feedback on specific aspects of the learning environment and learning experience, with most general student ratings interpreted as 'student satisfaction' and not 'student learning'.	<b>Outstanding</b> and positive student feedback, utilized to highlight effective teaching and learning and also as an ongoing process of improvement. <i>Examples include</i> consistent and positive student feedback via the end-of-semester survey, use of mid-semester feedback to improve teaching, consistently strong student comments regarding enhanced learning and without notable concerns regarding teaching practices that hinder learning, etc.
<b>5. Peer evaluations, commentary, and feedback.</b>	We consider feedback from peers as a valuable perspective on teaching effectiveness and encourage all faculty in the Department to fulfill the expectation of engaging in a peer review of instruction at least once per academic year.	<b>Strongly positive</b> and criterion-based peer observations. <i>Examples include</i> (1) classroom observations accompanied by comprehensive and positive written feedback based on criteria for teaching effectiveness, (2) having peers observe more than the minimum according to your rank/tenure status to demonstrate an active effort in teaching development, (3) inviting a CATL representative to observe or provide feedback on an online course and responding to their feedback to create a more effective learning environment,

		etc.
<b>6. Evidence of student learning</b>	Evidence of student learning should be provided for each course taught. This may include indirect and direct measures such as: student scores on a 'pre' and 'post' test, and/or annotated samples of student work; information about how students benefited from the course post-completion; statements by alumni or unsolicited letters of support. Such evidence is weighted more when clearly linked to stated course goals and objectives. For additional examples of this evidence, please refer to materials provided by the UWL Joint Promotion Committee (JPC).	Required
<b>7. Inclusive teaching practices</b>	Create and maintain an inclusive learning environment, and provide equitable learning opportunities for students.	Implementation of inclusive teaching practices to address a concern or equity gap in one's course <i>and</i> assessment of the effectiveness of the new practices. <i>Examples include</i> (1) integrating evidence-based practices to serve students identified at risk of poor performance, (2) collaborating with other campus resources to provide student support for learning, (3) engaging in teaching modifications that directly benefit underperforming students, etc.
<b>8. Teaching awards or recognitions</b>	<i>Valued, not required.</i>	Receiving nominations and/or final award for competitive teaching award. Nominations for awards will be considered with preference given to final award recipients.
<b>9. Teaching-related or course improvement grants</b>	<i>Valued, not required.</i>	Applying for and/or receiving teaching-related grants. Applications will be considered with preference given to final grant recipients.
<b>10. Professional development for teaching</b>	Engagement with professional development for teaching is expected; this may include attending teaching-related conferences or workshops.	Above average level engagement in teaching development activities and evidence of how they are applied or utilized. <i>Examples include</i> (1) actively participating in CBA Faculty Development events, (2) attending multiple CATL sponsored events, (3) participating in teaching related workshops with professional groups or non-UWL academic conferences, or (4) presenting at teaching-related workshops or conferences, etc. as well as clear application of such activities to promote student learning.

<b>11. Engagement with High Impact Practices</b>	Engagement with some level of High Impact Practices (HIP's) is expected, while it is acknowledged that the level and type of engagement will vary.	Significant involvement in High Impact Practices such as undergraduate and/or graduate research mentorship, internationalization instructional activities, and/or community-engaged instructional activities. <i>Examples include</i> (1) supervising students' undergraduate research (2) supervising McNair Scholar projects, (3) record of student research mentees who present their work at conferences or in publications, (4) collaboration with organizations for community-engaged or project/client-based class projects, (5) utilization of Collaborative Online International Learning (COIL) or other internationalization techniques.
<b>12. Developing a new course, re-designing an existing course, curricular elements or program.</b>	Development and/or application of new or revised instructional activities.	Development and/or application of significant new, original and effective (i.e., assessed) instructional activities <i>and</i> assessment of the effectiveness of the instructional activity. <i>Examples include</i> (1) implementing a new technique from a teaching workshop, (2) applying a new, evidence-based pedagogical technique in a course, (3) engaging in a significant overhaul of instructional mode (e.g., from face-to-face to blended), (4) development of a new course or significant re-design of an existing course.
<b>13. Descriptions of additional engagement with student learning.</b>	<i>Valued, not required in a given year.</i>	Additional teaching activities may be considered as extra-meritorious, to be determined by the Merit Committee.

## **Department Statement on professionalism**

In development and based on this statement: <https://www.aaup.org/report/statement-professional-ethics>



## Appendix C. Merit Evaluation Form

Department ranked faculty: complete this form as a self-evaluation and submit as part of your merit materials to the Merit Committee chair by the indicated deadline.

Merit Committee members: complete the following for every merit eligible faculty member except yourself. You may attach comments to this form if the room provided here is insufficient. Please check the appropriate rating and submit your evaluations to the Merit Committee chair that will tabulate the rankings and provide results.

	Overall Merit Evaluation		Extra-Merit Performance Recognition Categories		
	Not-Meritorious	Meritorious	Teaching	Research	Service
Name of Ranked Faculty1					
Comments:					
Name of Ranked Faculty2					
Comments:					

## Resources and references

- Benton, S. L., & Young, S. (2018). *IDEA Paper #69: Best Practices in the Evaluation of Teaching*. Manhattan, KS: The IDEA Center.
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<https://digitalcommons.unomaha.edu/slcehighered/58>
- Cerbin, Bill (2013) "Emphasizing Learning in the Scholarship of Teaching and Learning," *International Journal for the Scholarship of Teaching and Learning* Vol. 7: No. 1, Article 5.651.
- Chickering, A. W., & Gamson, Z. F. Development and adaptations of the seven principles for good practice in undergraduate education. *New Directions for Learning and Teaching*. Wiley. 654  
<https://doi.org/10.1002/tl.8006>
- Eberly Center: Teaching Excellence & Educational Innovation, Carnegie Mellon University. *Teaching Principles*. Retrieved Feb., 2020, from: <https://www.cmu.edu/teaching/principles/teaching.html>.
- Lynton, E. A. (1996). Ensuring the quality of outreach: The critical role of evaluating individual 661 and collective initiatives and performance. *Journal of Public Service and Outreach*, 1(2), 16-22. 662

**Appendix D**  
**Criteria for Membership on Post Tenure Review Committee (PTRC)**

1. **Teaching**--the department member should meet ONE of the following criteria:
  - (a) The member's fractional median for Student Evaluation of Instruction (SEI) items 2-24 should be above the department average, or at least 4.0 for at least three of the previous six semesters (or at least half of the semesters taught, if at UW-L less than six semesters);
  - (b) The member should have earned at least 80 out of 100 merit points on the previous year's "Improvement of Instruction" category of the Departmental Merit Form, as determined by the previous year's Merit Committee.
2. **Research**--the member should meet the College of Business Administration (CBA) Scholarly Productivity Guidelines.
3. **Service**--during the previous three years the member should have served on at least two committees from any of the following types of committees: (a) University of Wisconsin System, (b) University, (c) CBA, or (d) Department of Management. Additionally, the member should have received merit points during at least one of the previous three years for community or professional service.

## Post Tenure Review Form

Complete the following form for each post tenure review eligible faculty member. You may attach comments to this form if the room provided here is insufficient. Please check the appropriate rating and submit your evaluations to the PRT chair that will tabulate the results.

	Teaching		Research		Service	
	Meeting Expectations	Not Meeting Expectations	Meeting Expectations	Not Meeting Expectations	Meeting Expectations	Not Meeting Expectations
Name of Ranked Faculty 1						
Comments:						
Name of Ranked Faculty 2						
Comments:						

## Post Tenure Review Evaluation Guidelines

A meeting expectations denotes satisfactory performance related to a tenured faculty member's responsibilities and expectations. To receive a meeting expectations designation, faculty members must perform their Teaching responsibilities at a satisfactory level, as determined by students and peers, meet any CBA Scholarship & Practitioner Productivity Guidelines and meet Service responsibilities as outlined in the PTR bylaws.

## Appendix E: Individual Development Plan (IDP)/Performance Appraisal template

### Department of Management Individual Development Plan/Performance Appraisal Form

#### Instructional Academic Staff -Planning and Review

<b>Name</b> _____ Years of Service _____ Years in Current Title _____		<b>Current Title:</b> <div style="display: flex; flex-wrap: wrap;"> <div style="width: 50%;"> <input type="checkbox"/> Associate Lecturer  <input type="checkbox"/> Lecturer  <input type="checkbox"/> Senior Lecturer  <input type="checkbox"/> Distinguished Lecturer         </div> <div style="width: 50%;"> <input type="checkbox"/> Clinical Instructor  <input type="checkbox"/> Clinical Asst. Professor  <input type="checkbox"/> Clinical Assoc. Professor  <input type="checkbox"/> Clinical Professor  <input type="checkbox"/> Clinical Distinguished Professor         </div> </div>
<b>Dept. /Unit</b> _____	<b>% of Appt.</b> _____	<b>Appointment Type:</b> <input type="checkbox"/> Terminal: <input type="checkbox"/> Academic Yr <input type="checkbox"/> Annual Yr <input type="checkbox"/> Semester I <input type="checkbox"/> Semester II <input type="checkbox"/> Renewable   Specify Type _____ <input type="checkbox"/> Indefinite
<b>Appointment for Year:</b> _____		<b>Review Completed by:</b> <input type="checkbox"/> Department Chair <input type="checkbox"/> Committee _____ <b>Review Schedule:</b> Last Review _____ Next Review _____

Date of meeting: \_\_\_\_\_

Department Member Met With (names of IAS Review Committee members):

**INSTRUCTIONAL ACADEMIC STAFF SAMPLE POSITION DESCRIPTION**  
**(USE PERSON'S ACTUAL DESCRIPTION, IF AVAILABLE)**

**Summary:** Under general supervision of department chair, teaches college courses in the Management Department. Department, evaluates students' work, maintains appropriate records, and holds office hours.

PERCENTAGE	CORE FUNCTIONS
<p>[_____]%</p> <p><i>Traditionally, 75%+ of the role for Lecturer</i></p> <p><i>Total number of instructional credits –</i></p> <p>credits</p>	<p><b>Instruction and Assessment of Students</b></p> <ul style="list-style-type: none"> <li>• Prepare and deliver curriculum to undergraduate (and/or graduate students).</li> <li>• Prepare course materials such as syllabi, homework assignments, and handouts, ensuring they comply with department, college and university guidelines including accessibility for students with disabilities.</li> <li>• Evaluate and grade students' class work, assignments, and papers utilizing the department's grading guidelines, if any.</li> <li>• Maintain regularly scheduled office hours in order to advise and assist students.</li> <li>• Compile, administer, and grade examinations and other assessment measures.</li> <li>• Initiate, facilitate, and moderate classroom discussions.</li> <li>• Maintain student attendance records, grades, and other required records, and deliver them to the Registrar as directed by UW-L policy.</li> <li>• Supervision /maintenance of studio/ lab as appropriate.</li> </ul>
<p>[_____]%</p> <p><i>Typically not seen in the Associate title</i></p>	<p><b><i>Additional duties which may or may not affecting workload calculation please provide detail on any duties checked:</i></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Service obligations (Dept, college, university) – Describe:</li> <li><input type="checkbox"/> Advising obligations - Describe</li> <li><input type="checkbox"/> Student teacher supervision or fieldwork supervision</li> <li><input type="checkbox"/> Laboratory/Studio Instruction-describe</li> <li><input type="checkbox"/> Distance learning--describe</li> <li><input type="checkbox"/> Larger class sizes/double sections--describe</li> <li><input type="checkbox"/> Directed study--describe</li> <li><input type="checkbox"/> Teach applied music lessons or direct music ensembles</li> <li><input type="checkbox"/> Theatre production work</li> <li><input type="checkbox"/> Undergraduate research</li> <li><input type="checkbox"/> International teaching</li> <li><input type="checkbox"/> Professional development</li> <li><input type="checkbox"/> Grant work</li> <li><input type="checkbox"/> Scholarship</li> <li><input type="checkbox"/> Other, specify:</li> </ul>
100%	<b>TOTAL PERCENTAGE [NOTE: MUST total 100%]</b>

**Annual Portfolio Review Checklist – to be used by the ad hoc IAS Review Committee**

(All of the following do not have to be present for a successful review.)

_____ % <b>Teaching</b>	NA	No Evidence	Evidence	Comments
Direct measures of student learning including sample work by students				
Indirect measures of student learning				
SEI scores				
Classroom observations by peers				
Teaching development activities				
Annual Leadership Activities in Instructional Engagement are required to maintain Instructional Practitioner Status. The activities below may qualify.				
Development of new teaching materials				
Grants to support teaching improvement				
Innovations in curriculum				
Leadership role in enhancing the curriculum				
Evidence based teaching improvements				
Directed student research				
Teaching awards				
Other:				

_____ % <b>Service/Professional development/Scholarship</b>	NA	No Evidence	Evidence	Comments
Student advisement				
Department service				
College service				
University service				
Mentoring				
Practitioner Engagement and Activities are required to maintain Instructional Practitioner Status. The activities below may qualify. Peer reviewed publications are required for Scholarly Practitioner status.				
Membership in professional organizations				
Professional service				
Discipline-related community service				
Leadership roles				
Continuing professional education				
Conference/workshop attendance				
Publications				
Presentations				
Works in progress				
Grants				
Other:				

_____ % <b>Reassigned time (if applicable)</b>	NA	No Evidence	Evidence	Comments
Description:				

## OUTCOMES (RESULTS) from last year: \_\_\_\_\_

The outcomes session will be a review of employee career goals and expectations of the previous year.

### RATING SCALE

<b>(S) Satisfactory</b>	Consistently meets or exceeds the requirements of the job
<b>(E) Emerging</b>	Is making progress towards outcomes expected to meet job requirements
<b>(N) Needs Improvement</b>	Is not sufficiently meeting or progressing towards the outcomes expected
<b>(U) Unsatisfactory</b>	Is not meeting, or making sufficient progress towards, the expectations/requirements of the job <i>(provide suggestions for improvement)</i>

### EMPLOYEE CAREER GOALS from PREVIOUS IDP YEAR

Specify employee career goals and success indicators from the previous IDP period and consider to what extent they were achieved. Explain any change to goals that occurred during the year and identify factors that caused the goal to be met or not to be met.

**Employee Career Goals -----Success Indicators-----Evaluation/Comments**

### REVIEWER POSITION EXPECTATIONS GOALS FOR PREVIOUS IDP YEAR

Explain reviewer's position expectations and success indicators from previous IDP and explain to what extent they were achieved. Explain any change in expectations that occurred during the year and identify factors that caused the expectation to be met or not to be met.

**Reviewer's Expectations -----Success Indicators-----Evaluation/Comments**

## Evaluation of Performance Relative to Standard Expectations for this Position

<b>Performance Outcomes:</b>	S	E	N	U	Supporting Evidence
Teaching Performance (including peer and/or student evaluations)					
Professional Development/ Scholarship activities for meeting CBA guidelines					
Service Activities for meeting CBA guidelines					
<b>Behavioral Expectations:</b>					
Holds class as scheduled					
Conducts rigorous classes					
Adequate grade distributions					
Holds appropriate office hours					
Ensures currency of course					
Selection of textbook/materials					
Appropriate syllabi, tests, asmts.					
Adequate preparation/pedagogy					
Respect/treatment of students					
Time on-campus					
Quality Service					
Maintains records/grades as required					
Works cooperatively to facilitate the success of dept., college, and UWL					

**Merit Pay:** The candidate is: \_\_\_\_ Highly Meritorious \_\_\_\_ Meritorious \_\_\_\_ Not Meritorious

**CBA productivity guidelines have been discussed during this review**      **Yes**      **No**

We have met and reviewed the outcomes (results) from the previous review year and have discussed and planned for the next review year.

\_\_\_\_\_  
Employee Signature/Date

\_\_\_\_\_  
Supervisor Signature/Date

(Signature does not necessarily indicate agreement of IDP results but simply acknowledges that the items were reviewed)



**DISCUSSION for next year:** \_\_\_\_\_

*The discussion session will establish the timelines in which to accomplish the established employee career goals and supervisor position expectations throughout the next year.*

Department/Unit Goals (to be filled in by reviewer)

Employee Career Goals (to be filled out during discussion)

Reviewer Position Expectations for next review year (to be filled out during discussion)