EQUITY-MINDED ANNUAL MERIT REVIEW CRITERIA RUBRIC

Equity-Minded Annual Merit Review Criteria Rubric

The ADVANCE Project CREST Team is dedicated to ensuring faculty evaluations are completed in a fair and equitable manner so that all the vital work our faculty do for our university, our students, and our disciplines is given credit. Annual merit reviews are a chance for celebrating faculty achievements, identifying areas to strengthen, and planning for a successful year to come. The guidelines and criteria for annual merit review should be transparent, equitable, and flexible to account for all the different ways our faculty demonstrate their knowledge and expertise. This rubric is a tool for reviewing your unit's annual merit review criteria and process documents with an eye toward ensuring the equitable treatment of all our faculty and all that they bring to the table.

This rubric was adapted from the Audit Resources for Equity-Minded Reform of Faculty Evaluation Policies published by the American Council on Education (ACE) in 2022. ACE's audit resource is intended to be used in conjunction with the comprehensive discussion of research, examples, and solutions offered in another ACE report: Equity-Minded Reform of Faculty Evaluation: A Call to Action from Drs. KerryAnn O'Meara and Lindsey Templeton.

We hope this rubric is a useful resource to units as they create and revise annual merit review criteria that are comprehensive and equitable in their evaluation of faculty.

Sincerely,

The Project CREST Team

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ADVANCE PROJECT CREST

Annual Merit Review Coding Rubric

Guiding Principles of Equity and Inclusivity

Scoring (0 - Absent, 1 - Addressed but room for improvement, 2 - Fully addressed)

1	**Transparency and Clarity**
1.1	Is the annual merit review document easily understood (there is no ambiguity that could invite bias or misinterpretation)?

2	**Accountability**
2.1	Are there responsible actors and steps identified if the criteria and processes are not followed?

3	**Context**
3.1	Can faculty expect that they will be evaluated by peers who understand the relevant contexts of their work (e.g., appointment type, field, methods, and epistemologies as relevant)?
3.2	Do the criteria provide ways to bring relevant contexts (COVID, sabbatical, leave of absence) into view for the evaluation of faculty work?
3.3	Are the criteria flexible enough to adapt to new, different, and changing contexts in academia (and the disciplinary field) shaping faculty careers and work?
3.4	Do the criteria account for expected professional and collegial behavior?

4	**Holistic and comprehensive assessment**
4.1	Do the criteria promote a holistic assessment of teaching/research/service or is there an overreliance on FCQs/h-indices/committees?
4.2	Are the criteria welcoming and open to a variety of ways of knowing (knowledge construction)?
4.3	Do the criteria include what it means to meet and/or exceed teaching/research/service categories relevant to different appointment types, ranks, and differentiated workloads?
4.4	Do the criteria recognize the different impacts of international vs local/regional work?
4.5	Do the criteria recognize diversity, equity, and inclusion work within research/teaching/service?

5	**Teaching considerations**
5.1	Do the criteria recognize faculty engaged in different modes of instruction such as in-class, online, and hybrid?
5.2	Do the criteria account for the availability of a teaching assistant, size of the class, type of class (graduate or undergraduate) or the number of new preps in a given year?

6	**Research and creative works considerations**
6.1	Do the criteria provide a broad definition of research and creative works (including recognition of interdisciplinary work)?
6.2	Do the criteria value a broad set of research products over specific types?
6.3	Do the criteria recognize alternative products and venues for dissemination of scholarship (e.g. podcasts, blogs, social media, webinars, remote conferences)?
6.4	With the expansion of pay-to-publish outlets and predatory journals, do the criteria clearly state peer-reviewed publications are expected?
6.5	Do the criteria recognize the value of varied publication outlets, venues, and presses to reach a broad audience?
6.6	Do the criteria explicitly value collaborative work?

7	**Grant considerations**
7.1	Do the criteria recognize grant submissions along with grant awards?
7.2	Do the criteria recognize PI, co-PI, evaluator, and consultant roles?
7.3	Do the criteria recognize the time and effort of administering, carrying out, and closing out grants?

8	**Service considerations**
8.1	Do the criteria articulate the value of campus service, define it, and layout what is considered an appropriate amount of service?
8.2	Do the criteria articulate the value of disciplinary service, define it, and layout what is considered an appropriate amount of service?