Editor of Editorial Board Handbook

Version 1.0
Dear Editor:

Congratulations! You have been nominated by your institution or by MERLOT to be an Editor of an Editorial Board of MERLOT. The MERLOT Management Team and the consortium of Project Directors welcome you to our community. MERLOT is an international initiative enabling faculty to integrate technology in higher education. Ten systems and institutions of higher education as well as the National Science Foundation and the Educational Learning Initiative of EDUCAUSE support MERLOT.

The MERLOT project is an online community of faculty and institutions collaborating to increase the quantity of high quality, web-based, interactive teaching and learning materials. Finding web-based materials to incorporate into one’s course is just the first step for faculty; faculty must also decide if the materials are correct, are effective teaching and learning tools, and are easy to use.

A continually growing collection of high quality online teaching and learning materials is realized through the peer review process. The MERLOT project has developed a process for the peer review of instructional technology and your expertise is critical to the success of the endeavor. Over 100 faculty members from these institutional partners have been performing the peer review of instructional technology, modeled after the peer review processes for research and scholarship.

The MERLOT community has recognized that there is a significant and growing need for many institutions of higher education to develop and deliver high quality academic programs that serve regional and national communities. The MERLOT Management Team and the consortium of Project Directors developed five (5) selection criteria for members of the Editorial Boards:

- Instructors are recognized for their expertise in the discipline.
- Instructors are recognized for their excellence in teaching.
- Instructors have experience using and/or developing technology in teaching and learning
- Instructors have meaningfully participated in activities of their professional association(s).
- Instructors are willing and able to fulfill the roles and responsibilities of members of the MERLOT Editorial Boards.

Additionally, Editors are selected for their leadership capabilities and abilities to manage the Editorial Board. You were chosen as an Editor because we believe you have the ability to guide and motivate Editorial Board Members and direct their efforts toward the mission and goals of MERLOT. Further, you have the skill to determine and influence the strategic direction of MERLOT.
Your position on the MERLOT Editors’ Council reflects the judgment of your peers that you are an exemplar in these areas. We are sure you will find this a rewarding commendation of your accomplishments. As MERLOT’s Director of Academic Partner Services and representing the consortium’s interests, I offer you our sincere congratulations.

As a MERLOT Editor, your responsibilities include:
- Leadership of the Editorial Board
- Development and Maintenance of the Discipline Collection
- Management of the Peer Review Process
- Development of the Discipline Community
- Participation in MERLOT Meetings and Teleconferences

This Editor Handbook should serve to guide you in accomplishing your responsibilities as Editor. Included here are MERLOT policies, guidelines for Editors, and examples of documents that you will use in your position.

Again, congratulations on this appointment. I look forward to your contributions to MERLOT and to the advancements in the teaching of your discipline.

Sincerely,

Cathy Swift, Ph.D.
Director - Academic Partner Services
BEING A MERLOT EDITOR .................................................................................................................. 8
LEADERSHIP OF THE EDITORIAL BOARD ......................................................................................... 8

EDITORIAL BOARD MAKE-UP ............................................................................................................. 8
WELCOMING NEW BOARD MEMBERS ................................................................................................. 9
  Procedures ........................................................................................................................................... 9
  Sample Documents ............................................................................................................................ 11
TRAINING NEW BOARD MEMBERS ..................................................................................................... 12
  Procedures ........................................................................................................................................... 12
  Sample Documents ............................................................................................................................ 13
PROMOTING BOARD MEMBERS ......................................................................................................... 14
  Procedures ........................................................................................................................................... 14
  Sample Documents ............................................................................................................................ 15
COMMUNICATING WITH MERLOT LEADERSHIP COMMUNITY .......................................................... 16
  Discipline Conference Calls ............................................................................................................. 16
  In the Vineyard ................................................................................................................................. 17
  Grapevine ........................................................................................................................................... 17
  Discipline Listservs ............................................................................................................................ 17
EVALUATION OF THE EDITORIAL BOARD ....................................................................................... 18
  Tracking Editorial Board Members .................................................................................................. 18
  Sample Documents ............................................................................................................................ 19

MANAGING THE COLLECTION .......................................................................................................... 20

EXAMINING SITES .............................................................................................................................. 20
INVESTIGATING BAD LINKS ................................................................................................................ 20
ASSESSING THE CATEGORIES ........................................................................................................... 21
EXPANDING THE COLLECTION ......................................................................................................... 21
MONITORING THE COLLECTION ...................................................................................................... 22
SELECTING THE CLASSICS AWARD WINNER .................................................................................. 22
SELECTING OTHER AWARD WINNER(S) ............................................................................................ 22

CONDUCTING THE PEER REVIEW PROCESS .................................................................................... 23

OVERALL EDITOR RESPONSIBILITIES ............................................................................................... 23
PROCEDURES ....................................................................................................................................... 23
  Triage ................................................................................................................................................ 23
  Individual Peer Reviews ................................................................................................................ 24
  Consolidated Peer Review Reports ................................................................................................ 24
  Communicate with Authors ........................................................................................................... 25
  Sample Documents ........................................................................................................................... 27
RECRUIT AND SELECT PEER REVIEWERS ........................................................................................ 28
  Procedures ........................................................................................................................................ 28
  Sample Documents .......................................................................................................................... 29

BUILDING THE COMMUNITY ........................................................................................................... 30

MAINTAINING THE COMMUNITY PORTAL ......................................................................................... 30
COMMUNICATING WITH NEW MEMBERS ........................................................................................ 30
VIRTUAL SPEAKERS BUREAU ............................................................................................................... 31
PROMOTING MERLOT ....................................................................................................................... 31
SUPPORTING DOCUMENTS ............................................................................................................... 34
BUILDING RELATIONSHIPS WITH PROFESSIONAL ORGANIZATIONS ........................................ 35
  Procedures ........................................................................................................................................ 35
  Sample Documents .......................................................................................................................... 35
PARTICIPATION IN MERLOT MEETINGS ..............................................................36
LEADERSHIP CONFERENCE CALLS ...............................................................36
ATTEND MIDYEAR MEETING ........................................................................36
ATTEND MERLOT CONFERENCE ..................................................................37

APPENDIX A – MERLOT POLICIES & PROCEDURES ........................................38
NEW DISCIPLINE SELECTION POLICY .........................................................38
GUIDELINES FOR DEVELOPING DISCIPLINE’S CATEGORIZATION SCHEME FOR MERLOT COLLECTIONS ..........................41
Three Guiding Principles: ..............................................................................41
The “Do It Better” List....................................................................................42
“Don’t Do It” List ..........................................................................................42
POLICIES REGARDING THE MERLOT COLLECTION ..................................43
Policy for Contributing Materials into the MERLOT Collection ..................43
Policy for Removing Materials from the MERLOT Collection ....................45
Policy on Marginal Materials in MERLOT ..................................................47
POLICIES REGARDING PEER REVIEW .........................................................48
Evaluation Standards for Learning Materials in MERLOT .........................48
The MERLOT Rating System ........................................................................50
Posting Ratings for Peer Reviews: No Stars, 3, 4, 5 stars ..........................50
Peer Review Process ......................................................................................52
The MERLOT Peer Review Report ..............................................................54
Policy of the Submission and Peer Review of Websites That Are Collections of Learning Materials ..........................................................55
GUIDELINES FOR RECOMMENDING AFFILIATIONS WITH PROFESSIONAL ORGANIZATIONS ......................56
Justification for Alliances .............................................................................57
Why should Professional Organizations Affiliate with MERLOT? .............57
Why Should MERLOT Develop Affiliations with Organizations? ...............57
Assumptions ...................................................................................................59
Basic Assumptions about Alliances ..............................................................59
Supporting Documents ..................................................................................60

APPENDIX B – SUPPORTING DOCUMENTS .................................................61
WELCOMING NEW BOARD MEMBERS ......................................................61
(PD_NewMember_Info) ..................................................................................61
(PD_NewMember) ..........................................................................................62
(DAPS_Greet) ................................................................................................63
(New_Member_Welcome) .............................................................................64
(New_Member_BoardAssign) .........................................................................65
(New_Member_Editor) ...................................................................................67
(Editor_New_Member_Welcome) .................................................................68
(Editor_New_Member_Announce) .................................................................69
(Editor_New_Member_Orientation) ............................................................69
(Instruction_Member_Comments) ...............................................................70
(Instructions_Triage) .....................................................................................71
TRAINING NEW BOARD MEMBERS ............................................................73
(Peer_Review_Guide) .....................................................................................73

APPENDIX C - MERLOT PEER REVIEW REPORT ..........................................74
INTRODUCTION ..............................................................................................74
THE DESCRIPTION FIELDS ...........................................................................75
Overview .........................................................................................................75
Type of Material ..............................................................................................76
Technical Requirements ................................................................................78
Learning Goals ...............................................................................................79
Recommended Use(s) ....................................................................................80
Editor Handbook – v1

Target Student Population .................................................................................................................. 80
Prerequisite Knowledge ...................................................................................................................... 80

THE EVALUATIONS AND OBSERVATIONS FIELDS ........................................................................ 81
Quality of Content ............................................................................................................................... 81
Potential Effectiveness as a Teaching/Learning Tool – Strengths and Concerns .................................. 82
Ease of Use – Strengths and Concerns .................................................................................................. 83

ADDITIONAL INFORMATION ............................................................................................................. 84
(Mentor_New_Member) ......................................................................................................................... 87
(Peer_Reviewer_Assign_Review) .......................................................................................................... 88
(Instructions_Review_Form) ............................................................................................................... 89
(Review_Form) .................................................................................................................................. 92
(Instructions_Workspace) ................................................................................................................... 96
(New_Member_Feedback) ................................................................................................................... 97

PROMOTING BOARD MEMBERS ..................................................................................................... 98
(PD_Associate_Promotion) .................................................................................................................. 98
(DAPS_Associate_Promotion) .............................................................................................................. 99
(Associate_Announce) ......................................................................................................................... 101
(Editor_Notify_Reviewers) ................................................................................................................... 102
(RUN_REVIEWER_REPORT) ............................................................................................................... 103
(Goals.Board) .................................................................................................................................... 104

CONDUCTING THE PEER REVIEW PROCESS .................................................................................. 106
(Peer_Reviewer_Reminder) .................................................................................................................. 106
(Author_Letter) .................................................................................................................................... 107
(Designee_Letter) ................................................................................................................................. 109
(Author_Designee_Email) ..................................................................................................................... 111

RECRUITING AND SELECTING PEER REVIEWERS ......................................................................... 112
(Peer_Reviewer_Email_Thanks) ......................................................................................................... 112
(Peer_Reviewer_Email_Acknowledge) ................................................................................................. 113
(Peer_Reviewer_Letter_Acknowledge) ................................................................................................. 114

BUILDING THE COMMUNITY .......................................................................................................... 115
(NewMemberCommunity_Letter) ......................................................................................................... 115
(MERLOT_Template) ............................................................................................................................. 117
(Emails_Departments) ......................................................................................................................... 118

BUILDING RELATIONSHIPS WITH PROFESSIONAL ASSOCIATIONS ....................................... 120
(Alliance_Form1) .................................................................................................................................. 120
(Alliance_Form2) .................................................................................................................................. 121

APPENDIX D – GUIDE TO MAIN MERLOT ....................................................................................... 123
Homepage Tabs .................................................................................................................................... 123
Other Features of the Homepage ......................................................................................................... 126
Material Detail ..................................................................................................................................... 127
Searches ............................................................................................................................................... 128

APPENDIX E – GUIDE TO WORKSPACE ......................................................................................... 129

MY WORKSPACE ................................................................................................................................. 129
Setup Discipline ...................................................................................................................................... 129
Manage People ..................................................................................................................................... 135
Advanced Search ................................................................................................................................. 137
Discipline Overview ............................................................................................................................. 139
My Reviews ........................................................................................................................................ 140
My Triages .......................................................................................................................................... 141
Letters ............................................................................................................................................... 141

MATERIAL WORKSPACE .................................................................................................................. 141
Being a MERLOT Editor

The Editor of an Editorial Board has four primary responsibilities:
- Leadership of the Editorial Board
- Managing the Collection
- Conducting the Peer Review Process
- Building the Community

This guide will help the Editor understand what is involved in each of those major responsibilities. It is also hoped that the Editor will use the Handbook as a reference source. Each of the above responsibilities is dealt with in detail.

Leadership of the Editorial Board

As leader of the Editorial Board, the Editor is accountable for the following:
- Welcoming new Board Members
- Mentoring new Board Members
- Promoting Board Members
- Communicating with Board Members

Editorial Board Make-up

Editorial Boards are comprised of one or two Editors and other Editorial Board Members. Sometimes the Boards that have two Editors call both of the Editors, Co-Editors.

The MERLOT management team and the consortium of Project Directors developed five (5) selection criteria for members of the MERLOT Discipline Editorial Boards:
- Faculty are recognized for their expertise in the discipline,
- Faculty are recognized for their excellence in teaching,
- Faculty have experience using (and/or developing) technology in teaching and learning,
- Faculty have meaningfully participated in activities of their professional association(s),
- Faculty are willing and able to fulfill the roles and responsibilities of members of the MERLOT Discipline Editorial Boards.

Other members of the board include Peer Reviewers and Associate Editors.

- **Peer Reviewers** are expected to fulfill the responsibilities listed below:
  - Participate in the Editorial Review Board peer review process
  - Participate in the contribution of resources to MERLOT
  - Participate in the community development process
  - Attend required MERLOT meetings and teleconferences
  - Select the Classics Award winner
  - Participate in MERLOT program activities
• **Associate Editors** are former Peer Reviewers who have excelled in their responsibilities and who are asked to assume more of a leadership role. If the discipline has sub-topic areas, the Associate Editors may assume leadership of the sub-discipline. They may manage the Peer Reviewers in that sub-discipline, triage the modules, and consolidate the Peer Reviews. It is up to the Editor to determine if the individual is ready to assume the role of Associate Editor.

• **Peer Reviewers** are people who have been recruited by the Editorial Boards to help perform Peer Reviews. Many Editorial Boards have enacted a policy that if volunteer Peer Reviewers perform five or more reviews per academic year, they may join the Editorial Board as an Honorary Board Member for the next academic year.

**Welcoming New Board Members**

Editors will be welcoming new board members on several occasions:

• When new institutions become partners with MERLOT, the Project Directors will provide names and contact information to the Editors. These new Board Members will need to learn about MERLOT and learn about their roles and responsibilities as a Board Member.

• Existing partners may also change the individual who has been a Member of the Editorial Board. These new individuals will be treated just as if they were from new institutions.

• Those who have graduate from GRAPE Camp may wish to participate as an Editorial Board Member, without being from a Partner institution. They should be willing to take on the activities of other Editorial Board Members, i.e. supporting the collection, participating in conference calls.

**Procedures**

It is important to understand that new board members may not be aware of MERLOT. We like to start off making a good impression on them and make them feel part of the team right away. The following are procedures that have been established. These steps should be followed to ensure that the person is brought up to date as quickly as possible.

1. The Project Director (PD) selects the New Member to be a Board Member. The PD sends the contact information and Editorial Board Designation to the MERLOT Director - Academic Partner Services (DAPS) using the format established in *(PD_NewMember_Info)* document. (All documents for this activity appear in a list at the end of this section and in full format in Appendix B). They also appear on the Editors Portal ([http://editors.merlot.org](http://editors.merlot.org)).

2. The PD sends a letter to the New Member that defines the System or Campus expectations. *(PD_NewMember)*
3. DAPS sends welcome email to New Member. Asks person to join MERLOT as a registered member and asks them to email back with complete contact information as well as areas in which they will review. *(DAPS_Greet)*

4. When confirmation is received, DAPS sends email with attached welcome to New Members, assigning person to an Editorial Board and outlining job responsibilities. *(New_Member_Welcome) (New_Member_BoardAssign).* DAPS requests that New Member attend the next GRAPE Camp or participate asynchronously.

5. *DAPS* sends email to Editor of Board informing Editor about New Member *(New_Member_Editor)*

6. DAPS adds New Member to Editorial Board listing on webpage. DAPS notifies MERLOT Webmaster to add New Member to Discipline list serv.

7. Discipline Editor sends welcoming email to New Member to confirm expertise and advises of the day and time for conference calls. Editor confirms that New Member is MERLOT registered member and adds New Member to Workspace. Editor also asks New Member to provide complete description and picture for My Profile. *(Editor_New_Member_Welcome)*

8. Editor sends email to other Editorial Board Members to introduce New Member *(Editor_New_Member_Announce)*

9. Optional: New Member can be asked to begin triage of modules in his/her area of expertise. Editor sends instructions. *(Instructions_Triage).*

10. New Member advises these tasks are complete.

11. Editor reviews New Member’s Comments and works with New Member to correct any problems.

12. Editor mentors New Member on first assigned Peer Review, providing feedback

13. DAPS implements New Member Conference Call with all New Members.
Sample Documents

PD_NewMember_Info
PD_NewMember
DAPS_Greet
New_Member_Welcome
New_Member_BoardAssign
New_Member_Editor
Editor_New_Member_Welcome
Editor_New_Member_Announce
Editor_New_Member_Orientation
Instruction_Member_Comments
Instructions_Triage
Training New Board Members

It is up to the Editor and Editorial Board Members to train the New Member and get that New Member off to a good start. We recommend that the Editorial Board assign someone from the Board, preferably an Associate Editor, to be a Mentor to the New Board Member.

Every New Member will go through GRAPE Camp (Getting Reviewers Accustomed to the Process of Review). Thus, they will receive the training offered by MERLOT to enable them to do MERLOT Peer Reviews. During GRAPE Camp, they will receive several materials that will help them in Peer Review. These include:

- 2011 Guide for Writing Peer Review Reports for MERLOT
- The online Business Peer Review Tutorial
- Instructions for Making Member Comments
- MERLOT Policies Regarding Peer Review
- The Business Peer Review Report Form (now v 16.1)

Procedures

The following are recommended procedures for training the New Member of the Editorial Board.

1. Editor sends email to New Member and asks him/her to enroll in GRAPE Camp.

2. Once the individual has graduated from GRAPE Camp, Director – Academic Partner Services will send the Editor an email to introduce the two and advise that the individual has completed GRAPE Camp.

3. Editor will immediately contact the individual and welcome him/her to the discipline.

4. Editor assigns Mentor to New Member and directs Mentor to work with the New Member as he/she is trained. *(Editor_Mentor)*

5. Editor or Associate Editor assigns first peer review to New Member via email, copying the Mentor. Editor attaches several other documents: Instructions for completing Review Form, Review Form, and Instructions for Posting to Workspace. *(Peer_Reviewer_Assign_Review) (Instructions_Review_Form) (Review Form) (Instructions_Workspace)*

6. Mentor maintains weekly contact with New Member to encourage New Member to ask questions about the review and MERLOT Peer Review Process. Mentor provides ongoing feedback during peer review process to New Member

7. Mentor reviews submitted review on Workspace until satisfied that it is correct.

8. Mentor contacts Editor or Associate Editor with feedback regarding New Member’s Review. Editor or Associate Editor emails feedback on review to New Member *(New_Member_Feedback)*
9. Steps 5 to 8 can be completed with other reviews until Mentor and Editor are satisfied with New Member’s reviews.

Sample Documents

Peer_Review_Tutorial (not really document, but online tutorial)
Peer_Review_Guide
Editor_Mentor
Mentor_New_Member
Peer_Reviewer_Assign_Review
Instructions_Review_Form
Review_Form
Instructions_Workspace
New_Member_Feedback
Promoting Board Members

Because there are only three positions on an Editorial Board, (Editor, Associate Editor and Peer Reviewer), dedicated individuals can be promoted to Associate Editor. These individuals are expected to assume additional responsibilities. These can include, but are not limited to:

- Assuming responsibility for a sub-discipline and acting as an Editor of that sub-discipline.
- Serving as a Mentor and Trainer for all New Members or volunteer Peer Reviewers.
- Serving as the Contact for all volunteer Peer Reviewers and/or having responsibility for recruiting them.

Each year, Editors have the opportunity to suggest whether or not the Board Member should continue as a Peer Reviewer or be promoted to Associate Editor. When the Board Members are supported by Systems or Campuses, it is up to the Project Director to approve the promotion.

Procedures

1. Editor or Associate Editor can recommend that Peer Reviewer be promoted to Associate Editor or continue as Peer Reviewer.

2. PD advises DAPS of willingness to promote and sends letter to new Associate Editor, outlining new responsibilities. (PD_Associate_Promotion)

3. DAPS sends letter to new Associate Editor recognizing promotion and describing new responsibilities. Sends copy to PD and Editor (DAPS_Associate_Promotion)

4. Editor sends email to Board Members to advise them of promotion of Associate Editor. (Associate_Announce)

5. Editor provides training for Associate Editor at MIC and/or sends email detailing procedures that Associate Editor will be following. (Associate_Procedures)

6. Optional: Editor sends email to Peer Reviewers to advise that Associate Editor will be handling that sub-discipline and will be working with them. (Editor_Notify_Reviewers)

7. Associate Editor copies all communications with Peer Reviewers to Editor.
Sample Documents

(Ed Board Evaluation)
Pd Associate Promotion
DAPS Associate Promotion
Associate Announce
Editor Notify Reviewers
Communicating with MERLOT Leadership Community

As the Leader of the Discipline, the Editor is responsible for all communications with Editorial Board Members. The Editor uses two primary communications in fulfillment of his/her duties.

- Discipline Conference Calls
- In the Vineyard
- Grapevine

Discipline Conference Calls

Editorial Boards normally hold twice monthly conference calls through the Academic Year (September – May). There are specific procedures to follow for these conference calls.

1. Editors will contact Editorial Board Members to establish a time in which they can meet on the telephone. Since Board Members are operating in different time zones, the Editor should ensure that the times suggested are according to the various time zones.

2. Once the times are established, the Editor should set the exact dates for the calls, using a calendar. Normally this will have to be repeated at the end of each semester, due to teaching schedules.

3. After the dates are set, the Editor should contact the MERLOT Operations Administrator (jspiegel@calstate.edu) and advise of the times (using Pacific time) and specific dates of the calls. This should be done at least two weeks before the first conference call of the semester.

4. MERLOT Operations Administrator will send the Editor the toll-free number for the call along with the host code and the participant code. The host code is for the Editor while the Participant Code is for anyone else who joins the call.

5. Prior to each call, an agenda should be mailed to all Board Members. Accompanying the agenda should be the toll-free number and participant code. The times for at least the Eastern and Pacific time zones should also be listed. For the first call of the semester, Board Members should be advised that they need to call the toll-free number at the specific time, and when asked for the participant code, enter that in followed by the # sign. When others “enter” the call, a sound will occur.

6. Board calls should last for a specific time period, either one hour or one half hour.

7. It is suggested that conference calls be taped so important points made during the call can be discussed without having to take notes. Conversely, the Editor may designate one of the Board Members as the Minutes Writer. This responsibility can be shared among Board members.

8. After the conference call ends, minutes should be sent to all Discipline Editorial Board Members.
9. At the end of the semester, if the next reservation is made early enough, the same number and codes may be used.

In the Vineyard

MERLOT Management publishes an internal (April, September, December) newsletter for the MERLOT Leadership Community. The Newsletter is meant to inform the Leadership Community of what is happening in MERLOT as well as to celebrate news about the Leadership Community.

Prior to each issue, the Director – Academic Partner Services will send an email to the MERLOT Leadership Community to ask for any notices for the issue. The Editor is encouraged to use this opportunity to submit information about the activities of Editorial Board Members.

The In the Vineyard will be sent to all Editorial Board Members and Project Directors. The Editor may, at his/her discretion, email the publication to other people, primarily other Peer Reviewers. This is a great technique to make these individuals feel a part of the team.

Grapevine

The Grapevine is the newsletter that goes out to all MERLOT Members. When there are Editorial Board accomplishments that relate to all MERLOT Members, these can be sent in for this publication. Normally, the Grapevine will include items of interest to MERLOT Members that were also included for In the Vineyard, because it goes to a different audience.

The current issue of the Grapevine can be accessed at the following address: http://portals.merlot.org/grapevine/index.html
Past issues can be found in About Us in the Media Center tab as well as at the following address: http://taste.merlot.org/grapevinearchives.html

Discipline Listservs

Each Editorial Board has a listserv, normally in the format of discipline@lists.merlot.org i.e. teacher_education@lists.merlot.org and biology@lists.merlot.org
Editors are responsible for advising the Webmaster when changes occur to the listserv, so they can be updated.

There is also a list serv for Editors. Since you are on that list serv, you are able to send messages. editors@merlot.org
Evaluation of the Editorial Board

Each year the Editor should suggest Goals for the Editorial Board for the following year. The goals. These goals can include aspects of the contributions of the Board for the next year, or other objectives, such as presentations, papers, etc.

Tracking Editorial Board Members

Editors are able to continuously track Editorial Board Performance by using the MERLOT Workspace. It is suggested that Editors check monthly to determine that Editorial Board members are steadily working on MERLOT.

The tracking process is also used by Editors when they are evaluating Editorial Board Performance. Instructions for completing this activity are provided below. (Run_Reviewer_Report)
Sample Documents

Goals Board
Editor Self Evaluation
Managing the Collection

The Editor has the overall responsibility of managing the Materials that are added to MERLOT in the Editorial Board’s Discipline. Some of these responsibilities include the following:

- Examining sites
- Investigating bad links
- Assessing the categories
- Expanding the collection
- Monitoring the collection
- Selecting the Classics Award annually

Examining Sites

The Editor should ensure there is a regular process for evaluating the sites that are added to the Discipline. Normally, this takes place during the Triage Process. However, if there are sub-disciplines within the Discipline that are not being triaged by a Board Member on a regular basis, then the Editorial Board should develop some type of process to monitor the appropriateness of those sites.

To examine these sites, one should click on the Sub-discipline in the Learning Materials list. Materials are normally sorted by Peer Review Rating. However, to view the most recently added materials, use the drop-down list to select “Date Added.”

The MERLOT process for deleting sites is as follows:

- The site contains pornographic material
- The site is inaccurate or contains faulty information
- The site provides no pedagogical content
- The site is used only to promote a commercial enterprise

Editorial Boards may also determine more rigid policies for acceptance into the MERLOT collection. If that is the case, the materials can be removed from the collection. However, caution is urged in doing so, as there may be others who find the materials beneficial. The Editor should also track which sites have been removed, provide a reason, and notify the Webmaster.

Investigating Bad Links

On a monthly basis, the MERLOT Webmaster will check all links to the materials in the collection. The result is a list of materials having invalid URLs. Actions of the Webmaster include the following:

1. The URL is "backtracked" - i.e., parts of the existing URL are deleted, one at a time working backwards, to see if a valid page can be found.
   a. If a valid page for the site of origin is found and it has a Search function, a search for the title of the material is conducted.
2. If the material is no longer available on the original site or if there isn't Search function on the site of origin, a Google search is done using the title of the material, the author's name, and/or the author's organization if known.
3. If the material cannot be located on the site of origin and a search does not locate a new URL (either on the site or in Google), an email is sent to the author and submitter of the material, the webmaster of the site of origin if possible, and to the appropriate Editor. This will be in the form of an Excel spreadsheet.

4. The Editor should use all attempts possible to try to find the link. These may include, but are not limited to:
   a. Attempting to find the Author’s material on the University site
   b. Doing a search for the material.
   c. Contacting the Author through email.

5. Once found, the Editor can update the Detail View with the correct link. The Editor should also report back to the Webmaster what specific actions were taken. To do so:
   a. Go to the Material Detail of the site
   b. Click on Edit Material on the right
   c. Change the URL in the address in Step 1
   d. Go to Step 5 and Save

Assessing the Categories

Periodically the Editorial Board should review the sub-categories for the Discipline. The Board needs to ensure that the categories reflect the current state of the discipline. If changes are needed for the categories, the Editor should inform the Webmaster.

When changes are made to the categories, it should be noted that some of the materials may need to be updated and re-categorized. This is a responsibility of the entire Editorial Board.

Expanding the Collection

The Editorial Board has the responsibility to expand the collection of materials in MERLOT. Annual goals should be set for each Editorial Board Member. In the outline of Board Member responsibilities, Board Members are expected to add at least 15 materials to the MERLOT collection on an annual basis.

There are several ways to find materials for adding to MERLOT.

- Editorial Board Members should be encouraged to add their own materials to MERLOT.
- Editorial Board Members should encourage colleagues at their institutions to add materials to MERLOT.
- Editorial Board Members should acquaint participants at professional associations with the advantages of adding their learning materials to MERLOT.
- When encountering a prospective site, if the Member does not have adequate time to add the material, it can be saved in a Favorites list and then added when time is available.
- Members can also use Search engines to investigate potential sites.
  - Google.com can be used when the topic is very narrow. Obviously, it will take a lot longer to find materials using this particular search engine.
  - Altavista.com contains some more academically relevant sites.
- In addition to the sub-category as a search term, consider using all or some of the following: university, teaching, syllabus, course.
Monitoring the Collection

As the leader of the Editorial Board, the Editor has the ultimate responsibility for monitoring the collection of materials within the discipline. With the emphasis on conducting peer reviews, much of the focus has been on reviewing new sites. However, there is also a need to review material that was reviewed several years previously to ensure that the rating is still accurate.

Periodically the materials in the collection should be reviewed to ensure that they are still relevant. Early peer reviews were not as complete as current ones, and the Editorial Board should endeavor to update the peer reviews. Additionally, with technology changes some of the earlier sites that were reviewed may need to be reassessed as they may use older technology.

Selecting the Classics Award Winner

Each year, the Editorial Board selects a site that it believes represents the discipline well and is an example of exemplary material. Each Editorial Board Member should nominate a site and designate a reason for the nomination. The Editor should provide a list of the nominated sites, and the Editorial Board Members should vote on the winner. If there is no clear winner, the Editorial Board Members should discuss the nominations in a conference call.

The Editor is required to determine the contact information of the author of the material. The nominee and contact information should be sent to the Director of Academic Partner Programs.

The Classics Award winners are presented with a physical award and a certificate at the MERLOT International Conference. Those who do not attend will be sent their awards after the conference.

Selecting Other Award Winner(s)

At the Editors’ Council meeting (Midyear meeting), the Editors may be asked to evaluate nominations for other awards that are presented, i.e. Innovative Use of MERLOT. If an Editor has been nominated, he/she will be excused from the voting. Editors are expected to read all the nomination packages and discuss them for the meeting. If an Editor is unable to attend a meeting he/she should try to find someone else as a representative.
Conducting the Peer Review Process

The Editor has a number of responsibilities in the Peer Review Process, some of which may be assigned to Associate Editors. Ideally, the Editor has Associate Editors in sub-disciplinary areas. In this case, the Associate Editor can be assigned Triage, Individual Peer Reviews, and Consolidation of Peer Review Reports. Associate Editors may also help manage the recruitment and supervision of volunteer Peer Reviewers. It is recommended that the Editor continue the responsibility of contacting the authors of peer-reviewed materials.

Overall Editor Responsibilities

The Editor(s) of the MERLOT Editorial Boards are responsible for the following tasks associated with the Peer Review Process.

1. The Editor is responsible for assigning Associate Editors to Sub-disciplines. If there is no Associate Editor available for a sub-discipline, the Editor assumes responsibility for that Sub-discipline and follows Associate Editor Procedures (below)

2. When Peer Reviews have been Consolidated, Editor reviews Composite Review.

3. Editor sends Composite Review to Author via “Workspace letter” with 2 weeks to answer. The Author’s Name, the Name of the Module and the due date must be entered.

4. Author replies to Editor. If Author says no, Review is not published.

5. Editor may add Author comments to review.

6. Editor posts Final Review to MERLOT.

7. Editor advises Associate Editor that Review has been published.

8. If volunteer Peer Reviewer did Individual Review, Editor sends to thank Volunteer Peer Reviewer

9. If Author requests, Editor sends letter to Author or to Author Designee(s), up to two individuals.

Procedures

Editors may assign Associate Editors the responsibility for managing peer reviewers, or some part of the process. The following describes the tasks Associate Editors are responsible for if using this process.

Triage

Associate Editor is responsible for Triaging Sub-Discipline. Editor sends via email (Instructions_Triage) the directions for Triage.
Individual Peer Reviews

1. Associate Editor selects modules to review.

2. Associate Editor assigns Peer Reviewer or Volunteer Peer Reviewer to module for Individual Review by sending email (Peer_Review_Assign_Review) and specifying due date, along with Review Form (Review_Form), if used, Instructions for Completing Review Form (Review_Form_Instructions) and Guideline for Entering Review in Workspace (Instructions_Workspace_Review).

3. If desired, Associate Editor sends reminder through Workspace if Review is late.

4. Associate Editor sends “gentle reminder” (Peer_Reviewer_Reminder) on day Individual Review is due if the review has not been done.

5. When both Individual Reviews have been completed, the Associate Editor either advises Editor or does the Consolidated Review.

6. Associate Editors, when assuming the responsibilities for coordination of peer review follow the same procedures for Editors as outlined in this book.

Consolidated Peer Review Reports

Associate Editors are also responsible for consolidating peer reviews and posting them in the MERLOT Work Flow Tool. The Consolidated Review should be completed after each of the Individual Reviews is completed. This will be indicated in the Item Workspace with Review Status of “Individual Reviews Completed.” When this appears, the Associate Editor should go to the Material Workspace by clicking on the name of the Learning Material. In order to be assigned the Composite, you will have been added to the Material Workspace.

To begin the review, click on the pencil in the right column on the same line as your name. You will have the opportunity to view both responses of the Peer Reviewers. If one is better than the other, you can click on the radio button of that individual and it will appear in the Consolidated Review text box. You can also copy and paste any of the material.

Step 1 (General) includes:
- Overview
- Type of Material
- Technical Requirements

You can either Save for Later or go to Next

Step 2 (Usage) includes:
- Learning Goals
- Recommended Uses
- Target Student Population
Prerequisites

Again, you can either Save for Later or go to Next

Step 3 (Content Quality) includes:
- Rating – You should average the two ratings
- Strengths – Again, you can select one of the Reviewers to represent all of the comments. However, if the second reviewer mentions additional Strengths, they should also be added.
- Concerns – See strengths above. NOTE: If anything less than a 5 rating appears, there must be at least one concern.

Again, you can either Save for Later or go to Next

Step 4 (Potential Effectiveness)
- Rating – You should average the two ratings
- Strengths – Again, you can select one of the Reviewers to represent all of the comments. However, if the second reviewer mentions additional Strengths, they should also be added.
- Concerns – See strengths above. NOTE: If anything less than a 5 rating appears, there must be at least one concern.

Again, you can either Save for Later or go to Next

Step 5 (Ease of Usage)
- Rating – You should average the two ratings
- Strengths – Again, you can select one of the Reviewers to represent all of the comments. However, if the second reviewer mentions additional Strengths, they should also be added.
- Concerns – See strengths above. NOTE: If anything less than a 5 rating appears, there must be at least one concern.

Again, you can either Save for Later or go to Next

Step 6 (Issues and Concerns) contains:
- Overall Rating – The two ratings should be averaged.
- Other Issues – Try to include comments from both reviewers
- Comments to Author – Use any comments here.

Now, you can either Save for Later or Submit.

If you Submit, you will notice in the Material Workspace that the Composite Review is listed as completed along with the date.

Communicate with Authors

Editors should closely monitor Workspace to determine when Composite Reviews have been completed. When the Composite Review is completed the Editor should send that review to the
Author for approval. Letters of support can be sent to the Author automatically in Workspace by clicking on the Send Letter button. However, the Editor may decide to do a more personal type of letter of recognition.

After the Author approves it for posting, the Review is ready to post. Workspace has a default time limit of 2 weeks for the Author to reply. If the Author has not replied after 2 weeks, the Review should be published by clicking on “Post.”

If the Author has some comments to be added to the Review, the Editor should send those comments to the Associate Editor for approval. Once the Associate Editor approves, they can be added to the final Review and it can be published.

In some cases, the Author may make a request:
1. To hold off on publishing the Final Review until changes have been made to the website. If that is the case, once these changes are made, the Associate Editor needs to go back to the Reviewers and ask them if the changes would change their comments and/or their rating. If so, ask them to do so. Another Composite Review would follow from this.
2. To publish the Final Review “as is.” The Author may then want to take some time to make changes and then request the process in 1. above.
3. The Author may also request that the Final Review not be published. The MERLOT policy is to grant the Author’s request. The Learning Material should then be removed from Workspace (but not from the MERLOT collection). Peer Reviewers should still receive credit for having completed the review.

The MERLOT letter to the Author includes the willingness to write up to 2 letters of support for the Author, including one to the Author. Workspace includes an area for writing a letter of support once the letter to the Author has been activated.

The Editor may prefer to send a formal letter as an attachment. There are two forms with which to do this. (Author_letter) (Designee_letter) These may be used in lieu of the automatic response. An email can be sent to the designee with the letter of support attached. (Author_Designee_Email)
Sample Documents
Instructions Triage
Peer Review Assign Review
Review Form
Review Form Instructions
Instructions Workspace Review
Peer Reviewer Reminder
Author Letter
Designee Letter
Author Designee Email
Recruit and Select Peer Reviewers

Editorial Board Members are encouraged to recruit Peer Reviewers on their own campuses, at professional organization meetings, at conferences, etc. When a prospect is found, the Editorial Board Member will inform the Director – Academic Partner Services. The prospect will be sent to GRAPE Camp for training in the Peer Review Process. When the prospect is ready, the DAPS will introduce the prospect to the Editor of the discipline. The Editor will then welcome the recruit as a new Peer Reviewer.

Procedures

1. Potential volunteer Peer Reviewer contacts Editorial Board Member.
2. Editorial Board Member contacts Editor regarding potential volunteer Peer Reviewer.
3. Editor sends email to Director – Academic Partner Services
4. DAPS contacts volunteer and requests specific information.
5. DAPS introduces potential Peer Reviewer to the Peer Reviewer GRAPE Camp
6. DAPS monitors Peer Reviewer through GRAPE Camp.
7. DAPS contacts Editor when Peer Reviewer has completed GRAPE Camp.
8. Editor provides a learning material from the discipline for the volunteer to complete.
9. Editor adds volunteer Peer Reviewer to Editorial Board on Workspace.
10. When volunteer Peer Reviewer finishes first review, DAPS evaluates the review.
11. DAPS asks the Editor to review the first review in Workspace.
12. Editor then contacts potential volunteer Peer Reviewer and evaluates the Peer Review via email or by telephone.
13. Editor asks volunteer how frequently he/she wants to review and explains the five review option if the Editorial Board uses it.
14. Editor sends email (Peer_Reviewer_Email_Thanks) to thank volunteer Peer Reviewer informally.
15. At end of year, DAPS sends Recognition Letters.
Sample Documents

(Peer Reviewer Email Thanks)
(Peer Reviewer Email Acknowledge)
(Peer Reviewer Letter Acknowledge)
Building the Community

As leader of the Editorial Board, it is the Editor’s responsibility to help build the community of Authors, Submitters, Users, and Peer Reviewers. There are a number of ways that this can be accomplished including:

- Maintaining the Community Portal
- Communicating with New Members
- Virtual Speakers Bureau
- Promoting MERLOT
- Building Relations with Professional Organizations

Each of these areas is discussed below.

**Maintaining the Community Portal**

When an Editorial Board is established within a discipline, a Community Portal is also created by the MERLOT Webmaster. A Portal Editor should be selected from members of the Editorial Board. Technical competence is not an issue, as Adobe Contribute is used to provide the content for the Portal. Adobe Contribute will enable the portal editor to quickly and easily update the website — with no technical expertise required.

In some cases the Editor has assumed the responsibility of the Portal Editor. The specific responsibilities of the Portal Editor are detailed in the Portal Editor Handbook.

It is essential that all members of the Editorial Board participate in providing content to the Portal. The Editor should also check periodically to determine that the content is relevant and current. The Editor should continually encourage input to the portal from all board members. The Showcase should also be changed on a regular basis, to be determined by MERLOT Management.

**Communicating with New Members**

When people first come to MERLOT, many times they are not sure of what to do. One way of building community is to contact those new members to send them a personal greeting from the Editor.

To do this, determine a schedule on which you will be sending these greetings, perhaps once a week. Then, click on Member Directory and then click on your Discipline on the left. The automatic sort for the listings is by Contributions. However, go to the drop down box and select Date Joined and click Go. This provides a list of the Members of your Discipline with the most recent one at the top. Select a start date and send an email (NewCommunityMember_Letter) to each of the individuals to welcome them to MERLOT. Remember to track who you ended with so you can go back to that spot the next time you send out welcomes.
Virtual Speakers Bureau

One way to help build the community is to encourage Editorial Board Members to join the Virtual Speakers Bureau to offer their expertise to others. Editors should continually promote this feature of MERLOT and encourage others to join whenever possible. Additionally, if there have been positive outcomes in using the VSB, this should be reported to MERLOT Management.

Promoting MERLOT

There are a number of ways that Editors can help to promote MERLOT including:

- Writing an article about MERLOT
- Presentations at professional conferences
- Presentations at campuses
- Visiting with Campus Librarian
- Sending emails to other departments on campus
- Posting MERLOT materials on campus
- Passing out MERLOT flyers at conferences or on campus.
- Professional list servs

Writing an Article about MERLOT

Many educationally-oriented journals welcome articles that pertain to teaching. Writing an article about MERLOT helps to spread the word about MERLOT either within the discipline or to all disciplines. There have been a number of discipline-oriented articles that have been published by Editorial Board members and others. When an article is published, it should be communicated to MERLOT Management. Copies can be scanned and placed on the MERLOT website.

Presentations at professional conferences

Presentations at professional conferences help inform people about MERLOT and how they can use the resources in their classes. At professional conferences, Editors can target specific Learning Materials that are relevant for the attendees at the professional organizations. Editors are encouraged to use the MERLOT PowerPoint format in developing these presentations. The template for this can be obtained from the Editors Portal .(MERLOT_template)

One can also recruit Peer Reviewers at professional conferences. There are several flyers that can be used for this purpose.

Presentations on campus

As an Editor, you are responsible for being a Champion of MERLOT on your campus and within your system. You should take every opportunity possible to talk about MERLOT within your department, college, and university. Several Editors have created Personal Collections for others within their department. You can also work with your Center for Teaching Excellence to ensure that MERLOT is covered in their presentations to faculty. Several campuses have incorporated MERLOT into their New Faculty meetings each year.
Additionally, some System Partners ask their Supported Faculty to make MERLOT presentations on other campuses in the system. You can show people from other disciplines how they can use materials in class by using the Award Winners from each Editorial Board.

**Visiting with Campus Librarian**

Campus Librarians continually run into people who are searching for information. Educating them about MERLOT could be very helpful to people on your campus. If there are several librarians, you could make a presentation to them and demonstrate how to search the MERLOT site.

Additionally, you could leave MERLOT flyers on desks in the library or on a bulletin board. MERLOT is just as helpful to students as it is to faculty members. MERLOT flyers can be found in Marketing Materials in the Media Center in About Us.

**Sending emails to other departments on campus**

In addition to being the resident expert on MERLOT, you can spread the word about MERLOT by contacting other departments on your campus, particularly those for which we have Editorial Boards. You can contact the Department Chair and let him/her know about the Discipline Portal for the relevant discipline. The Classics Awards winners also give a reason to contact the Department Chair regarding outstanding learning materials in the discipline. *(Emails_Departments)*

**Posting MERLOT Materials on Campus**

MERLOT has several different types of flyers available. Any of these could be posted on bulletin boards on campus where faculty members congregate. The flyers can be downloaded from the media page in About Us as well as from the Partner Reserve.

**Passing MERLOT flyers out at conferences or on campus**

Any of the MERLOT flyers could be passed out at conferences, even without a presentation scheduled. Many conferences have tables where information can be left. Also, you might consider passing out flyers on your campus or leaving them at the Teaching Center. You could also put a MERLOT flyer in faculty mailboxes.

**Sending MERLOT Write Ups to List servs**

There are a number of different list servs for each discipline. Normally one has to join the listserv to be able to post any information. Posting information on a periodical basis to the listservs can help educate people about MERLOT. Postings to listservs can be sent on a variety of topics:

- Update on the number of materials on MERLOT in the discipline
- Request for Peer Reviewers
- Write up on Classics Award winner in your discipline
- New Partner as Professional Organization
If you are a member of several listservs, you could develop a regularly scheduled release of information on an annual basis. This will help people in your discipline recognize MERLOT. If you want to have regularly distributed MERLOT information sent to the list servs, please contact the Director of Academic Partner Services with directions on how to join the list serv.
Supporting Documents

NewCommunityMember_Letter
MERLOT_Template
Emails_Departments
Procedures

MERLOT continually seeks to develop cooperative affiliations with professional organizations that share our common interests and goals regarding the use of technology in teaching and learning. There is a progression of involvements that can take place with Professional Organizations.

- **A Relationship** – The Editorial Board can develop simple relationships with Professional Organizations that do not involve effort on MERLOT’s part. These may include but are not limited to:
  - The name of the organization on the portal page
  - Using MERLOT voluntarily with standard RSS feeds
  - Having news and events announced on a MERLOT portal

- **An Alliance** extends a Relationship to a more committed form. An Alliance requires a commitment of resources from both MERLOT and the Alliance Partner.

There are specific benefits that accrue to MERLOT and to the Professional Organization when an Alliance is formed. These are outlined in “Guidelines for Recommending Affiliations with Professional Organizations” in Appendix A.

Editorial Boards are free to develop Relationships with Professional Organizations on their own, since there is no commitment on the part of MERLOT for resources. However, if an Editorial Board wants to pursue a deeper relationship, then there are steps that should be taken.

The first step is to gather information about the Professional Organization. *(Alliance_Form1)* There is a sheet for Background Information, which is essential, as well as a sheet for Optional Information. *(Alliance_Form2)* Editorial Boards, led by the Editor, are responsible for completing the information sheets prior to the involvement of MERLOT staff.

Once the assessment is made, MERLOT staff will take the next step of discussions with members of the Professional Organization and will work to get the Alliance going in conjunction with the Editorial Board.

**Sample Documents**

*(Alliance_Form1)*
*(Alliance_Form2)*
Participation in MERLOT Meetings

Editors are required to participate in several meetings during the year as part of the Campus or System agreement. As leaders of the Editorial Boards, Editors are expected to relay information back to their Board Members to keep them informed.

Leadership Conference Calls

Editors are responsible for “attending” the monthly Leadership Conference Calls. During these calls specific information is provided to Editors and Project Directors and discussions of other topics take place. This is the primary means through which MERLOT Management communicates policy, strategy, etc. to the Editorial Boards. Calls normally take place during the Academic Year (September – May).

Prior to the call, the Director – Academic Partnerships and Planning will send an Agenda along with the toll-free number and participant code for the conference call. Additional agenda items will also be solicited.

The Director – Academic Partnerships and Planning of MERLOT contacts the Editors at the beginning of each semester to determine time(s) which are most convenient for all of the participants. If the Editor cannot make the call MERLOT Management recommends that an Associate Editor attend in his/her place. That way all Editorial Board Members will be informed about what transpires.

Many of the points discussed during the conference calls can be relayed back to the Discipline Editorial Board Members to inform them of new directives or to encourage specific behaviors.

The Director – Academic Partnerships and Planning will publish minutes from the conference calls and will send these to members of the Editors Council.

Attend Midyear Meeting

Editors should attend the Midyear Meeting, normally held in January (mid-academic year). The Project Directors Council will meet with the Editors. There is also a virtual attendance opportunity if one cannot travel.

The Midyear Meeting is when new initiatives are presented to Editors and Project Directors. The objectives of the meeting are to:

- Achieve consensus on plans for the new initiatives
- Draft recommendations and guidelines to help MERLOT partners successfully implement MERLOT in their institutions
- Ready Editorial Boards to publish and sustain their MERLOT disciplinary portals
- Develop recommendations for continuously improving MERLOT’s processes
- Select Editors’ Choice Award winners
- Engage meeting participants and celebrate accomplishments
If the Editor is unable to attend the meeting he/she should attempt to find someone from the Editorial Board to represent him at the meeting.

**Attend MERLOT Conference**

The purpose of the meeting during the MIC (MERLOT International Conference) is to discuss what has been accomplished during the academic year and to celebrate MERLOT. Normally the Editors meet together with the other members of the Editorial Boards, or the MERLOT Leadership Community. Editors are expected to encourage all members of their Editorial Board to attend the MIC, as this is the only face-to-face meeting for them.

The MIC meeting is held prior to the actual presentations for the MIC, during the pre-conference workshops. The “meeting” is in three parts:

- **Leadership Workshop** – This workshop involves all members of the Editorial Boards and Project Directors. Each year some “faculty development” training is provided to them.
- **State of MERLOT Address** – The entire MERLOT Leadership Community gathers for an address by the Executive Director of MERLOT. The attendees of the Editorial Board Workshop as well as the Project Directors and Advisory Board members attend.
- **Individual Editorial Board Meetings** – Each Editor will meet with his/her Editorial Board in a location nearby. This provides an opportunity to work directly with each other and plan for the coming academic year. Editors should discuss goals with Board Members at this time.

If for some reason an Editor is unable to attend the MIC, and does not have a Co-Editor, he/she should designate another Board Member to be his/her representative.
Appendix A – MERLOT Policies & Procedures

New Discipline Selection Policy
Guidelines for Choosing a Discipline to Build a MERLOT Community and its Collection

There are high priority interests and needs that individuals, groups of institutions, or professional societies may have within or across disciplines in areas currently supported by MERLOT’s Editorial Boards. Enabling institutions to address their needs by developing and sponsoring a MERLOT community is an important element of MERLOT’s ability to be sustainable. It is also important for all MERLOT Communities to be developed and supported with consistent processes. To become established as a MERLOT Community, the institution and community must satisfy the following criteria:

1. Institution(s) leading and sponsoring the MERLOT community must be a Campus, System, or Alliance Partner.
2. A MERLOT community is developed in stages.
   2.1. Stage I - Taskforce: Build the collection of materials, assignments, and comments and build a MERLOT-Community portal
   2.2. Stage II – New Editorial Board: Implement the MERLOT Peer Review Process
   2.3. Stage III – Editorial Board: Curate the collection and build alliances with professional societies.
3. The Institution(s) or Organization(s) must provide a Project Plan document containing the following information for Stage I:
   3.1. Names, contact information of personnel who are to become members of the Task Force for Stage I of the Community. At least 4 members are required to establish a Stage I Task Force Community. The Taskforce will begin with a Chair, who will eventually become the Editor.
   3.2. The Chair of the Taskforce should be a faculty within an institution belonging to a MERLOT System, Campus, or Alliance Partner.
   3.3. Statement of purpose for the new MERLOT community.
   3.4. Statement of a two-year commitment of Taskforce members.
   3.5. List of activities the MERLOT community members will perform:
      3.5.1. Developing categorization scheme
      3.5.2. Adding Learning Materials to the collection
      3.5.3. Adding Member Comments
      3.5.4. Adding Learning Assignments
      3.5.5. Building the Community Portal
   3.6. Signed agreement to follow MERLOT policies
4. MERLOT will provide these Taskforce Communities with:
   4.1. Changes to the categorization scheme within MERLOT
   4.2. MERLOT policies and guidelines
   4.3. Listserv for members of discipline team
5. The Taskforce Communities will provide a report summarizing activities, processes, and achievements nine (9) months after the document for establishing Taskforce Community is submitted.
6. The MERLOT Management Team will monitor activities of the Taskforce Community to ensure compliance with MERLOT Policies. If issues arise, the Project Director of the Intuitionally Sponsored Community will be contacted, apprised of the situation, and will be asked to resolve the issue. If not sponsored by a System or Campus Partner, the MERLOT Management Team will supervise the Taskforce. The MERLOT Management Team reserves the right to discontinue support.

7. The Taskforce Community can conduct MERLOT peer reviews (Stage II) after satisfying the requirements of building the collection (Stage I). Members of the New Editorial Board community will then have access to the MERLOT WorkFlow Tool and training for conducting peer reviews.

New Editorial Boards are only initiated if: the selection criteria can be met, the Partners can provide Board members, and it is deemed a high priority to initiate the Board. The following guidelines outline the selection process:

Criteria for Selection New Discipline Communities and Collections

The following criteria guide the selection and implementation of a new discipline communities and collections:

1. **Organizational structure of the discipline is manageable within MERLOT:** The categorization scheme within the browse function of MERLOT for the discipline may be usable for a variety of users within the discipline and across others.

2. **Online materials in discipline are available for review:** A body of multi-media educational learning resources exists and is accessible for review.

3. **Availability of faculty leaders to participate on the Community Advisory or Editorial Board:** Partners can provide faculty who satisfy the selection criteria and who will commit the time to participate in MERLOT. Or, MERLOT Members have requested that such a community be developed.

4. **The discipline’s professional organization(s) readiness to collaborate in the collection development, peer review and community building processes:** The professional discipline organizations view innovation in education and teaching/learning with technology as a high priority and are prepared to collaborate to achieve common goals.

5. **Balances spread of Editorial Boards among and across disciplines:** The distribution of MERLOT Editorial Boards should be balanced across the sciences, arts, liberal arts, humanities, social sciences, health and human services and professional schools as much as possible.

6. **Improve student learning:** Students have difficulty learning concepts and other major learning objectives in the discipline and multimedia applications can improve learning outcomes.

7. **Readiness of faculty in discipline to use technology:** Faculty use and value academic technology; campus culture is open to innovation and use of technology in teaching and learning.

8. **Addresses enrollment pressures and growing disciplines:** Enrollment demands exceed institutions’ capacity to deliver traditional academic programs and web-enhanced programs are critical to provide access to quality education.
9. **Increases access to education in a new student market:** Web-enhanced classes can increase enrollment in discipline area.

10. **Need to reduce cost or risk of education practices:** Web-enhanced classes reduce the cost of equipment, labs, and supplies and/or are safer in comparison to traditional classes.

11. **Strategic importance to partner:** Discipline area is programmatically and “politically” important for Participant.

12. **Job-market pressures:** Economy demands more educated people in discipline area and web-enhanced programs can deliver more qualified students to market.

### New Discipline Criteria

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>APPLICATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Organizational structure of the discipline is manageable within MERLOT.</td>
<td>Required</td>
</tr>
<tr>
<td>2. Online materials in discipline are available for review.</td>
<td>Required</td>
</tr>
<tr>
<td>3. Availability of faculty leaders to participate on the Advisory or Editorial Board.</td>
<td>Required</td>
</tr>
<tr>
<td>4. The discipline’s professional organization(s) readiness to collaborate in the collection development, peer review and community building processes.</td>
<td>Critical</td>
</tr>
<tr>
<td>5. Balances spread of Editorial Boards among and across disciplines.</td>
<td>Critical</td>
</tr>
<tr>
<td>6. Improve student learning.</td>
<td>Critical</td>
</tr>
<tr>
<td>7. Readiness of faculty in discipline to use technology.</td>
<td>Critical</td>
</tr>
<tr>
<td>8. Addresses enrollment pressures and growing disciplines.</td>
<td>Important</td>
</tr>
<tr>
<td>9. Increases access to education in a new student market.</td>
<td>Important</td>
</tr>
<tr>
<td>10. Need to reduce cost or risk of education practices.</td>
<td>Important</td>
</tr>
<tr>
<td>11. Strategic importance to partner.</td>
<td>Important</td>
</tr>
<tr>
<td>12. Job market pressures.</td>
<td>Important</td>
</tr>
</tbody>
</table>
Guidelines for Developing Discipline's Categorization Scheme for MERLOT Collections

version 2.0  4/07

One of the opportunities that the MERLOT project offers discipline groups is the ability to help shape the organization of materials in MERLOT, both in discipline communities and the main MERLOT. One of the first tasks of discipline groups is to ensure that MERLOT has a rich enough categorization scheme for the collection of learning materials in the discipline. It is important that the collection of learning materials is organized in ways that:
1. enable faculty to add Learning Materials to the collection easily and reliably and
2. enable faculty to find the Learning Materials they are looking for easily and reliably.

In extending the existing categorization, however, attention must be paid to the whole MERLOT collection, so that the complete scheme remains coherent. What follows are some guidelines, which will hopefully assist you in creating categories, which work for the discipline and the whole. The Library of Congress Classification (LC) has been the classification scheme of choice for the MERLOT project. Disciplines are encouraged to look carefully at the LC to see if it may meet their needs. It is possible, however, that the LC will be insufficient for a discipline's needs. Disciplines should not feel they are required to adhere to the LC, but that they should at least begin with the LC and introduce modifications if needed.

Three Guiding Principles:

1) It is important to attempt to create categories that are as exhaustive and exclusive as possible. The categories should cover the discipline completely (there are no disenfranchised specialties) and the categories should overlap as little as possible. Note that this does not mean that every specialty needs its own category. It is sufficient that there be a higher level area that the specialty is part of. For example, In Business there were only 8 subcategories to begin with. Even though there are many sub-disciplines within Finance, for instance, at the beginning, the fact that there is a Finance category within Business is sufficient. As the collection grows, however, a need may arise to develop a more detailed classification scheme in Finance. The MERLOT policy is that once a category has 100 materials, it should be broken down into sub-categories.

2) Try to create a hierarchical scheme, which has consistent specificity. In other words, a category for "Flemish Painters of the 1600s" does not normally belong on the same level as "Sculpture". You also want to make sure you introduce a hierarchy when appropriate. A good rule of thumb is that there should be no more than 10 categories at any place on the tree (exceptions abound, so use good judgment).

3) Think about the variety of ways the variety of “users” will browse the collection.
The “Do It Better” List:

1. Follow as closely as possible the Library of Congress classification for your discipline.

2. Consider the curriculum topics of courses that are regularly taught (especially high enrollment courses). These topics can be very useful in developing your categorization scheme that would be familiar to a variety of users.

3. Restrict yourself to your discipline’s subjects and topics. Just because Physics or Engineering users find areas of Mathematics useful does not mean that we should replicate the Mathematics categories within Physics and again in Engineering. There are definitely areas of legitimate cross-over, and this is why it is possible to categorize materials in multiple areas, in addition to the occasional divergence from the LC.

4. Consider the materials which are currently available in your discipline area. The volume (or lack of it) may suggest that you adjust the detail appropriately. We have found that more than 100 items in the deepest category is too many to effectively browse without spending quite a bit of time, and it does little good to have so much detail that there are only a few materials in each.

5. Consider where having support material is particularly helpful in your discipline. If you create places for materials that would be useful, even if there is currently nothing in that category, it may encourage people to enter material into that category, find material for the category, or perhaps even develop material for that category. Use your judgment on the specificity needed (see principle 1 and the fourth item on the "do" list above).

“Don't Do It” List

1. DO NOT try to cover all the topics that faculty within your discipline may be interested in, regardless of what discipline the materials are actually part of. Remember that faculty can browse other discipline areas to find material that might interest them.

2. DO NOT worry about whether the categories will be perfect-- we can always alter the existing scheme if problems arise. The categories you pick are not set in stone.

3. DO NOT reinvent the wheel. Use existing hierarchies and organizational structures to help inform your categorization decisions.

MJKB, GLH, COS
Policies Regarding the MERLOT Collection

Policy for Contributing Materials into the MERLOT Collection
version 2.0 4/07

MERLOT is an open resource. People contribute material to the collection because they see some value in the material. For an open resource to work, it must enable participation and provide value to the participants. We recognize that there is a diversity of standards related to quality and this diversity is supported by the principle of academic freedom. Academic freedom does not mean that faculty are free to do a “poor job” teaching but it is a delicate balance between establishing quality standards and enabling the freedom to use diverse learning materials.

MERLOT is a resource for Learning Materials, Member Comments, Peer Reviews, Personal Collections, News and Events, and Member Profiles. Once individuals become Members of MERLOT, they can contribute Learning Materials, Member Comments, Learning Assignments, Activity Sheets, Personal Collections, News and Events, and Member Profiles. MERLOT Editorial Boards are the only ones who can contribute Peer Reviews.

Learning Materials developed by commercial agencies can be contributed to MERLOT if they can be used in some pedagogic function. (See Policy for Removing Materials from the MERLOT Collection for limitations on contributing materials developed by commercial agencies.)

Using MERLOT Evaluation Standards to Expand the MERLOT Collection of Learning Materials:

One goal of the MERLOT project is to create a large quantity of high quality, web-based learning and teaching materials. Expanding the collection with “good stuff” will require you to evaluate if the instructional software might be valuable for other faculty before you post the URL for the materials in MERLOT. When you find something that you “like”, review the evaluation standards and evaluate how the specific materials measure up to the standards.

If you decide the materials are “good enough” for the collection, you will need to fill out the “Contribute Materials” form for the learning materials. Go to “Contribute Materials” on the MERLOT .org website and follow the guidelines. Remember, you need to be a registered MERLOT member to contribute materials.

A critical element of your contribution is the description of the Learning Materials you provide other users. People will read your description first to decide if they want to learn more about it. Also, the SEARCH engine for MERLOT will search the descriptions for key terms the user is looking for. Consequently, the quality of your description will significantly affect other users finding relevant materials.

Guidelines for Descriptions:

1) Provide key concepts and terms that are addressed by the learning materials. Users typically search materials by the content or curriculum topics they are teaching. The key words you provide in the description need to be ones that others would look for.
2) Provide a description of the type of material. Is it a simulation, a tutorial, an animation, a collection of links, etc?

3) Provide a description of the purpose of the material. For example, “The simulation can be used to teach students xxx”

If you decide that the materials are “good enough,” you can attach your review as a “Member Comment” that would become attached to the description of the materials. You can also add learning assignments.

GLH/COS
Policy for Removing Materials from the MERLOT Collection

version 3.0 4/07

The development of the MERLOT collection should be guided by the following principles:

- Users should be able to find the best available learning material on MERLOT.
- Users should be able to expect searches of MERLOT to provide quality material and information regarding the quality of what is found.
- The process of finding materials should be simple, but also flexible enough to meet the diverse needs and searching styles of users.
- MERLOT should be as broad as possible to cover the needs of diverse users.
- Materials in MERLOT are not necessarily designed to be stand-alone learning materials. It is expected that some guidance on using some materials would be provided.

It is appropriate for the Editorial Boards for the MERLOT Discipline Communities to remove "inappropriate" materials from the MERLOT collection as long as it is balanced with the open resource values and practices of MERLOT. The reason for these policies is to turn the removal of materials into a set of positive guidelines for inclusion. The Editor is not able to remove any materials; however the Editor may request that the Webmaster remove the materials at any time and a reason must be provided.

The MERLOT Editorial Boards will develop and post the guidelines for inclusion/exclusion in the news and events location in the MERLOT-Discipline Community Portal. This policy will be posted in MERLOT About Us.

These guidelines should include:

- A list of reasons why people should give thoughtful consideration to the materials they add to the collection. For example, "Users should have confidence in the high quality materials they find in MERLOT."

- The criteria for inclusion/exclusion that will be applied by the discipline-specific MERLOT Editorial Board.

- The criteria should parallel the evaluation standards. Example criteria for inclusion of materials are:
  - Materials should be substantially accurate or consistent with acceptable perspectives (even if the materials is poorly presented)
  - Materials should have some educational value (strictly commercial products, personnel marketing materials, etc could be excluded from the collection; materials that do not provide educational content related to MERLOT’s collection)
  - Materials should be reliably available. The material can be removed if the link from MERLOT to the materials cannot be traced with reasonable effort
  - Materials must not transmit viruses or reliably produce failures in users’ systems
  - Materials should not have duplicate entries
  - Materials should not contain offensive content (foul language, pornography, etc.)
• Materials in non-English language can be included in MERLOT but the language used should be included in the description of the material.

• The Editorial Boards should be sensitive to the multidisciplinary nature of the MERLOT collection when developing and applying criteria. The multidisciplinary nature of MERLOT is one of its distinguishing features. For example, the people who come to the MERLOT -Math site may not be only math professors. Consequently, the collection should be "usable" for the non-math professors as well.

• The criteria should be easily defensible and believed to be widely accepted by faculty in the Discipline Community (including those outside the discipline-specific MERLOT Editorial Board). On rare occasions, the MERLOT Editorial Board can delete materials based on legitimate, ad hoc criteria, if these criteria are discussed and accepted by the MERLOT Editorial Board. It is expected that these ad hoc criteria would be subsequently included into the inclusion/exclusion criteria.

The procedure that the MERLOT Editorial Boards will use to remove materials from the MERLOT collection is as follows:
  a) Editorial Board develops consensus on inclusion/exclusion criteria.
  b) Editorial Board identifies materials that should be removed from the existing collection when two Board Members both evaluate the materials as not meeting minimal criteria for inclusion.
  c) Board Members send requests for the removal of the materials to the Editor.
  d) If Editor agrees, he/she removes the materials from the MERLOT-Discipline collection. Editors have "librarian status" within MERLOT.
  e) If materials are removed because of substantially incorrect content or broken links, Authors and Contributors will be notified that their entry in MERLOT has been removed and the reason for removal. The Author and/or Contributor may wish to correct the problem and can resubmit the corrected material. Materials removed because of duplicate entries, offensive content, and/or educational irrelevance will not result in notification of Authors and/or Contributors.
  f) The Editor must keep a record of the materials removed from the collection along with the reason for removal.
  g) Editors and the MERLOT Management Team will periodically review the policy and criteria for removing materials as well as the records of removed materials in the process of considering revision of policy and criteria.

GLH /BM /Biology Discipline Team/COS
Policy on Marginal Materials in MERLOT

version 2.0 4/07

The MERLOT peer review process aims at identifying the best materials in the MERLOT collection and the policy for removing materials aims at eliminating the worst. There will be materials that are marginal in quality that are identified by the discipline teams. Users should be provided fair warning about the problematic nature of these marginal materials.

When the Editorial Boards identify marginal materials for which they feel Users need fair warning, the Editor will inform the Author of the problem(s), leave the material in the MERLOT collection, and “flag” the material in one of two ways:

- A Peer Review report would provide no stars but would provide editorial comments concerning the problematic aspects of the materials.
- A Member Comment could be submitted by the Editorial Board and would provide editorial comments concerning the problematic aspects of the materials.

GLH, BM, COS
Policies Regarding Peer Review

Evaluation Standards for Learning Materials in MERLOT
version 3.0 4/07

One of the goals of MERLOT is to develop and apply evaluation standards for web-based learning materials. Faculty can use these evaluation standards to:

- Select new materials to submit to MERLOT,
- Review existing materials in MERLOT, and
- Provide requirements for development of new materials for MERLOT.

There are three general categories of evaluation standards to be used within MERLOT:

1) Quality of Content
2) Potential Effectiveness as a Teaching-Learning Tool
3) Ease of Use

Quality of Content
There are two general elements to quality of content:

- Does the Learning Material present valid (correct) concepts, models, and skills?
- Does the Learning Material present educationally significant concepts, models, and skills for the discipline?

To evaluate the Validity of the content, the reviewers should rely on their expertise. To evaluate the educational significance of the content, reviews can use the following guidelines:

1. Content is core curriculum within the discipline. Core curriculum topics are typically covered to some degree in the introductory classes within the discipline and/or “Everyone teaches it” and/or it is identified as a core area by the discipline’s professional organizations
2. Content is difficult to teach and learn.
3. Content is a pre-requisite for understanding more advanced material in the discipline

Potential Effectiveness as a Teaching and Learning Tool:

WARNING: This evaluation is the most difficult. Determining actual effectiveness requires actual use of the Learning Material by real students and faculty. Evaluating Potential effectiveness is asking you to judge, based on your expertise as a teacher, if the Learning Material is likely to improve teaching and learning given the ways the faculty and students could use the tool.

Sometimes the Learning Material being evaluated is “taken out of context”, making it difficult to evaluate. Remember that the value of the resource is its ability to be re-purposed for others to use in different contexts. In evaluating the Potential Effectiveness for Teaching and Learning, it is Critical to define the purpose of the Learning Materials. That is, you must contextualize your reviews. The MERLOT materials on Evaluation Standards and the Peer Review Reports emphasize this point. In performing a review, you can use the following three questions to help you define the pedagogical context.

1. What stage(s) in the learning process/cycle could the materials be used...
2. What is (are) the learning objective(s)? What should students be able to do after successfully learning with the materials?

3. What are the characteristics of the target learner(s)?

An evaluation would be conditional on how the Learning Material was used. For example, “if the faculty using tool X in a supervised lab with freshman, reviewed the content beforehand, and had the students do tasks A & B, then the software should enhance students’ learning. The reasons are…” All these issues and more are also represented in the Learning Assignment wizards in MERLOT.

There are other general elements to effectiveness as a teaching-learning tool that MERLOT asks reviewers to consider:

1. Does the interactive/media-rich presentation of material improve faculty and students’ abilities to teach and learn the materials?
2. Can the use of the Learning Material be readily integrated into current curriculum and pedagogy within the discipline?
3. Can the Learning Material be used in a variety of ways to achieve teaching and learning goals?
4. Are the teaching-learning goals easy to identify?
5. Can good Learning Assignments for using the Material be written easily?

Ease of Use
The basic question underlying the ease of use standard is: how easy it is for teachers and students to use the software for the first time? Elements that affect ease of use include:

Are the labels, buttons, menus, text, and general layout of the computer interface consistent and visually distinct?

Does the User get trapped in the software?

Can the User get lost easily in the software?

Does the Learning Material provide feedback about the system status and the User’s responses?

Does the Learning Material provide appropriate flexibility in its use?

Does the Learning Material require a lot of documentation, technical support, and/or instruction for most students to successfully use the software?

Does the Learning Material present information in ways that are familiar for students?

Does the Learning Material present information in ways that would be attractive to students?
The MERLOT Rating System

version 3.0 4/07

The primary purpose of the Peer Reviews and Member Comments is to allow faculty from any institution of higher education to decide if the online teaching-learning materials they're examining will work in their courses. The emphasis on the User's perspective is the reason why the Peer Reviews are performed by peer users of instructional technology, and not necessarily peer authors of instructional technology. The text in the Peer Review report is the most important information for faculty. Ratings should be used mostly as search indicators, rather than “answers”.

Reviewers providing Member Comments also use a 1-5 star rating scale.

- 1 Star: Materials not worth using at all
- 2 Stars: Materials do not meet minimal standards but there might be some limited value
- 3 Stars: Materials meet or exceed standards but there are some significant concerns
- 4 Stars: Materials are very good overall but there are a few minor concerns
- 5 Stars: Materials are excellent all around

Rating the three (3) criteria (Quality of Content, Potential Effectiveness, and Ease of User) allow users to separate the different aspects of the learning material. Three combinations of ratings are provided below as examples:

- High Quality, High Potential Teaching, and Low Ease of Use
  - Possible interpretation: Good curriculum but will require extensive user support and training.
- Low Quality, Low Potential Teaching Effectiveness, and High Ease of Use.
  - Possible interpretation: Bad curriculum but easy for a new users to get accustomed to using instructional technology.
- Medium Quality, Low Potential Teaching Effectiveness, and High Ease of Use.
  - Possible interpretation: Materials are accurate and easy to navigate but require extensive background knowledge.

In all three cases, people reading the reviews should be better informed about how they might (or might not) use the instructional technology in their classes.

Posting Ratings for Peer Reviews: No Stars, 3, 4, 5 stars

The current protocol for Peer Review ratings on the MERLOT website is to post ratings of 3, 4, or 5 stars and not post ratings that are 1 or 2 stars overall. Consequently, “no stars” attached to the Learning Material could mean that the material was rated poorly by the Editorial Board or the materials were not yet reviewed. Users could not distinguish between these two possibilities if there are no Member Comments.

Member Comments do have the 1-5 star range so users can (and have) provided 1 & 2 star ratings. Any MERLOT Member and/or Editorial Board Member can post Member Comments if they wish.
Why does MERLOT not post Peer Review ratings of 1 or 2 Stars? There are a number of different reasons:

1. MERLOT is an open resource. People contribute material to the collection because they see some value in the material. For an open resource to work, it must enable participation and provide value to the participants. We must recognize that there is a diversity of standards related to quality and this diversity is supported by the principle of academic freedom. Academic freedom does not mean that faculty are free to do a “poor job” teaching, but it is a delicate balance between establishing quality standards and enabling the freedom to use diverse learning materials.

2. MERLOT is a resource of End Products and Developing Products. The End Products should be ready for immediate and effective use. Developing Products are at an early or intermediate stage of development and will by definition have problems. Both End Products and Developing Products provide ideas and guidelines for developers and users of instructional technology. It will be critical to support the Developing Products because we need to create a process for encouraging the expansion of the collection.

3. There are a lot of good learning materials “out there” to review first. Practically speaking, identifying the good materials first is more important and useful than identifying the bad materials first.

4. MERLOT needs to build a sustainable culture of volunteerism and professional responsibility.

5. Posting positive reviews supports the good materials and provides the community with recognized samples of good materials.

6. Constructive criticism on the “bad” materials will identify areas that need improvement. The feedback can be used to engage Authors to participate more fully in MERLOT.
   - Authors can remove their materials from MERLOT
   - Authors can improve the materials and resubmit them to MERLOT
   - Authors can choose not to have the Peer Review posted and leave the material in MERLOT. Non-rated materials are initially sorted to the bottom of the list. As more positive reviews are generated, the non-rated materials will require more “active searching” by Users. Materials that have limited value could have a small but useful purpose for a small group of faculty.

7. Reviewers can provide Member Comments that could identify areas that need improvement. Member Comments can be rated 1-5 stars.

In summary, the purpose of the Peer Reviews, Member Comments, Learning Assignments, Assignment Sheets, and Material Detail records is to reliably educate faculty about the instructional technology so they can be successful in choosing and using instructional technology for their courses.

GLH/COS
Peer Review Process

version 4.0 4/07

MERLOT will conduct the peer review of the online teaching-learning materials. The peer review process for evaluating teaching-learning materials will follow the model of peer review of scholarship.

Faculty selected in accordance with the MERLOT guidelines will perform the peer review of the MERLOT learning materials. Each Editorial Board will have an Editor and Editorial Board Members who may be supported by a MERLOT Partner. These Editorial Boards will be supervised and managed by the MERLOT Management Team.

The Editorial Boards will perform the following activities in the Peer Review Process:

1. Develop Evaluation Standards
   - The MERLOT Editorial Boards are provided leadership, tools, and training in developing evaluation standards and processes.
   - The MERLOT Management Team will provide the discipline teams with a framework of evaluation criteria:
     - Quality of Content
     - Potential Effectiveness as a Teaching Learning Tool
     - Ease of Use
   - Initial training involves having Reviewers complete Individual Peer Reviews on the same Learning Materials.
   - All Peer Reviewers will share and compare their evaluations, following the procedure provided. The team will use these test cases to develop evaluation guidelines/criteria that will be applied to all materials.
   - The Editorial Board will need to develop substantial inter-rater reliability in the evaluations before evaluation procedures on all materials are implemented.

2. Conduct evaluations:
   - Discipline teams typically use a two stage review process:
     - Stage 1: Triage Review to identify worthy candidates and
     - Stage 2: Intensive Review of worthy candidates.

Stage 1 Triage Review Process:
   - The Editors assign materials to Peer Reviewers for Triage.
     - Board Members efficiently review the collection and provide cursory evaluations. There are four evaluations possible in the triage process: The material is:
       - Definitely worth reviewing (High Priority),
       - Possibly worth reviewing (Low Priority),
       - Not worth reviewing at this time (Remove from Peer Review process), or
       - Should be removed from the collection.
   - Peer Reviewers record their Triages in Workspace.
Peer Reviewers can post Member Comments based on cursory evaluations as appropriate

**Stage 2 Intensive Reviews:**
- Editors or Associate Editors review Triaged Learning Materials and assign High Priority materials to Peer Reviewers.
- If desired by the Editorial Board, Editors can provide Authors of materials opportunities to decline participation in review process within a two-week window.
- Each Learning Material is reviewed by two (2) different Peer Reviewers for the Editorial Board. The reviewers will apply the Editorial Board’s evaluation standards and review procedure, including the use of the Review Form.
- Peer Reviewers will write Peer Review reports in Workspace and advise the Editor/Associate Editor when they have completed the review.
- IF THERE IS A SIGNIFICANT DISPARITY IN THE TWO REVIEWS, the Editor will assign the material to a third reviewer or review the material himself/herself.

**4. Reporting Evaluations:**
- Editors/Associate Editors will integrate the two peer reviews into a Composite Review report that will be posted on MERLOT.
- The Editor will send the review to the Authors for their feedback using the email address in the MERLOT Material Detail record.
- The Author has two weeks to respond before the review is posted on MERLOT. The Author can respond by:
  - Providing his/her response to the review which would be posted with the Peer Review Report in MERLOT.
  - Providing feedback to the Editorial Board about the accuracy of the review.
  - Requesting a delay in the posting of the Peer Review to enable the author to revise the materials in response to the review.
  - Decline the posting of the review.
- Editors will post the Peer Review Report(s) in MERLOT upon author feedback or two weeks after notification.
- The “Author” of the Peer Review Report is the “MERLOT [Discipline] Editorial Board.”
- A list of the members of the “MERLOT [Discipline] Editorial Board” will be posted on the MERLOT site and on the Discipline Portal.
- The evaluation criteria and the review procedure will be posted in MERLOT.

GLH, Co-Leaders, CS
Members of the MERLOT Editorial Boards write a Peer Review Report containing the information below:

1. **Description of the Learning Material comprised of the Peer Reviewers’ summary of the material. The summary description will include:**
   - Overview: General Description of learning material
   - Type of learning material (simulation, tutorial, animation, etc)
   - Technical requirements (HW/SW/network)
   - Learning goals: Concepts to learn, skills to acquire, attitudes to develop
   - Recommended uses: conditions under which the material would be used
   - Targeted student population(s) and teachers who would find materials most useful
   - Prerequisite knowledge/skills required to use the learning material

2. **Evaluation of the Learning Materials, composed of the reviewers’ judgment of:**
   - **QUALITY OF CONTENT:**
     1) Evaluate the accuracy or validity of the material. Does the software present valid (correct) concepts, models, and skills?
     2) Evaluate the importance of the content for the discipline.
        - Strengths of the Learning Material
        - Concerns with the Learning Material
   - **POTENTIAL EFFECTIVENESS AS A TEACHING-LEARNING TOOL:**
     1) Evaluate the effectiveness of the presentation of the content. Does the software illustrate the concepts effectively so the students can successfully achieve learning goals (learn concepts/acquire skills)?
     2) Evaluate the effectiveness of the activities or ways of using the software that would facilitate student learning. Will the students learn the concepts and skills by using the software? Would the software be used in a supervised laboratory setting, in in-class demonstrations, in self-paced, home or lab setting?
        - Strengths of the Learning Material
        - Concerns with the Learning Material
   - **EASE OF USE:**
     Evaluate how easy it is for teachers and students to use the software. How much instruction would be needed for most students to successfully use the software?
     - Strengths of the Learning Material
     - Concerns with the Learning Material

GLH, CS
Policy of the Submission and Peer Review of Websites That Are Collections of Learning Materials

version 2.0  4/30/07

“Large” websites that are a collection of individual learning materials or modules present a need for a decision on the part of the Editorial Boards.

- It is recommended that the individual modules be separately submitted into MERLOT as well as the large website. This strategy will enable users to find the specific materials using MERLOT without extensive navigation of the original large website.
- It is also recommended that the individual modules be separately reviewed in MERLOT as well as the large website.

The following is the recommended procedure for Peer Reviews of materials that originate from a common collection in a large website.

1. The description of each module notes that the module is part of a larger site (The MERLOT title and url can be provided). This strategy would inform those who want to do more exploring to go to the larger site if they want.
2. Depending on how the large site is organized, you might not have to go to the smallest level of granularity (individual webpages) for all modules.
3. The appropriate level of granularity should be determined by a judgment of what constitutes a “unit of instruction”. The Editorial Board will have to judge what constitutes a “unit of instruction”. Consider what other faculty might search for in MERLOT to determine the size of the “unit of instruction.” The modules (animation, quiz, etc) would be a unit of instruction deserving a separate entry into the MERLOT database. Other users can add a layer of granularity after the fact.
4. Peer Review Reports can duplicate elements of the Peer Review Report across the modules within the same website. The usability could be very similar for all modules depending on the consistency in the user interface and user tasks. The potential effectiveness for teaching and learning evaluation could be very similar across the modules if the types of learning objectives and activities are similar. For example, if the animations are consistently used to illustrate dynamic interactions within different micro-bio phenomenon, then the potential effectiveness of the reviews could be duplicated for each module.
5. The quality of content review will require a separate and individualized evaluation - for example, "the animation of concept X is correct" - you'll need to fill in the X.
6. Some of the modules will require different "prerequisite knowledge and skills," have different learning objectives, and may be for different "levels" of students (lower division vs upper division). Consequently, this descriptive information would change for each module.

GH, CS
Guidelines for Recommending Affiliations with Professional Organizations

Version 2.0 5/30/07

MERLOT is a multi-disciplinary, searchable collection of teaching and learning materials as well as support services. MERLOT seeks to develop cooperative affiliations with professional organizations that share our common interests and goals regarding the use of technology in teaching and learning. In doing so, both partners are expected to contribute to a mutually beneficial activity that may be based on current MERLOT services or on new activities that can benefit both partners.

Relationships with Professional Associations

With the build-out of MERLOT’s community portals, it is possible for any discipline to create with a professional association, a “relationship” that is important to the discipline. Portal editors can affect such relationships without placing any demand on MERLOT volunteer and staff resources. Examples include:

- The Portal Editor can place the organization name/logo, with or without a link to the organization’s homepage, on the MERLOT Discipline portal, perhaps including a statement of support.
- The organization can voluntarily include MERLOT’s standard RSS feeds on its homepage.
- The organization can have its news and events announced on a MERLOT portal.

Extending a Relationship to an Alliance

There may be reasons for extending an existing or potential relationship to an “Alliance.” Alliances usually require a commitment of resources from both MERLOT and the Alliance partner. However, before exploring this potential, it is important for MERLOT to understand how a recommended Alliance partner will further the mission of the discipline making the recommendation.

The following section contains two forms to help you in considering a professional organization’s potential as an Alliance Partner with MERLOT. This information will provide MERLOT staff with the information necessary to explore the recommended Alliance.

- The first form, Form 1 should be completed for MERLOT by anyone wishing to propose an alliance between MERLOT and a professional organization. This information will provide MERLOT staff with your understanding of the organization and how an Alliance would benefit both parties. (Alliance_Form_1)
- The second form, Form 2, is more detailed and will be completed by MERLOT staff as we move forward towards a relationship with the organization. If you are able to provide any of that information, it would be greatly appreciated. Please complete the forms as best you can. If you feel that there is other information that can be helpful or if you have ideas that can help shape our Alliance rationale and strategies please don’t hesitate to provide it. (Alliance_Form_2)
Justification for Alliances

Why should Professional Organizations Affiliate with MERLOT?

Professional Organizations have strategic priorities that they want to address but frequently don't have the means to achieve them. Affiliating with MERLOT can be a strategy for achieving these priorities. Affiliations with MERLOT can provide the professional organization with:

- Opportunities to influence the continuous development of MERLOT’s tools, services, and processes that serve important needs of their members
- Opportunities to use the tools, services, and processes to support the organization’s needs

Why Should MERLOT Develop Affiliations with Organizations?

MERLOT has strategic priorities that are listed below. Developing cooperative affiliations is one strategy MERLOT is pursuing to address these priorities.

- Continue development, improvement, and productivity of the peer review of instructional technology. Requirements for success include:
  - Minimal institutional funding of academic peer reviewers
  - Increased recognition of faculty peer reviewers (where recognition leads to tangible and intangible rewards)
  - Increased number of peer reviews and peer reviewers
  - Publication of discipline-specific evaluation standards

- Increase utilization of MERLOT by faculty and students. Utilization includes:
  - Searching (and finding) materials in MERLOT
  - Contributing materials to MERLOT
  - Contributing user comments to MERLOT
  - Contributing learning assignments to MERLOT
  - Utilizing MERLOT instructional support services

- Recognition and acceptance of MERLOT as a high quality tool and process for higher education

Potential Benefits from Affiliations with MERLOT

From the list of strategic priorities as well as a set of assumptions that we make about alliances, we can identify potential benefits from collaborations between MERLOT and professional organizations.

- MERLOT is a project founded on the academic principles of the university and is organized to protect the academic integrity of the teaching of its disciplines. MERLOT is the non-profit alternative to the commercial organizations (online universities, educational technology companies, etc.) whose goal is to capture the educational market and control the curriculum and the teaching of disciplines.
• MERLOT is partially supported by the National Science Foundation (NSF). MERLOT can provide professional organizations access to events convened by the NSF National Science Digital Library Program and possible funding for online community projects.

• MERLOT can serve the needs of the professional organization’s members by providing easy access to academic content and strategies for teaching the discipline. The professional organization can help shape the design and content of MERLOT to best serve its members.

• MERLOT can provide opportunities for its members to participate in the organization’s activities by involving members in the peer review of instructional technology – a process that can be supported by both MERLOT and the professional organization.

• MERLOT can provide information to the organization’s members that help their professional development and understanding of the changes in the discipline through the MERLOT Discipline portal. The professional organization could contribute to the design and content of the website to meet its members’ needs.

• MERLOT can conduct workshops and focus groups at professional organizations’ conferences to:
  o Identify members’ needs, priorities, and evaluations of instructional technology,
  o Facilitate communications between new users of instructional technology and experienced users, between authors and users.
  o Educate members on using instructional technology and MERLOT, and
  o Identify instructional technology materials that are needed but missing from current collections.

• MERLOT can provide research reports on using instructional technology and its effectiveness in student learning and teacher satisfaction through presentations at professional organizations’ conferences. Alternatively, members of professional organizations can attend MERLOT conferences to learn about instructional technology and teaching-learning at reduced or free registration fees.

• MERLOT can provide a mechanism for the recognition of its members’ contributions to the development of the discipline with the peer review process and news and events. The authors of instructional technologies, peer reviews, and learning assignments all can be recognized for their scholarship of teaching. The professional organization could help shape the awards and recognition process of MERLOT-discipline community.

• MERLOT can be a mechanism for expanding professional organizations’ membership by linking organizations’ websites to MERLOT’s. The significant number of hits to the MERLOT website would increase the visibility of the professional organization. The increased number of faculty making contact with the professional organization could increase its members’ (new and old) participation in the organization’s activities (such as governance, conferences, publications, curricula and technology project, etc.)

• The professional organizations can join their reputations with MERLOT’s to attract faculty to perform the peer review process as part of their professional responsibilities (as is the case with the peer review of research and scholarship). MERLOT would benefit from the significant financial resources otherwise required to pay for release time.
Professional organizations can provide links to other collections or individual materials supported by the professional organization. MERLOT can provide an additional distribution point for organizations’ materials.

Assumptions

Basic Assumptions about Alliances

To understand and plan strategies for developing affiliations between MERLOT and professional organizations, it is necessary to list the assumptions about the environments within which these affiliations may be developed.

Assumptions about MERLOT

- MERLOT will not “give up” its database or processes to a professional organization.
- MERLOT is not interested in “taking over” other online collections or processes.

Assumptions about Professional Organizations

- There are professional organizations or divisions of professional organizations whose missions include:
  - Enhancing the teaching of the discipline, and/or
  - Professional development of the members.
- Members of these professional organizations are faculty and staff who are motivated to fulfill effectively and efficiently their teaching and training responsibilities, enabling effective teaching and learning.
- Professional organizations have a motivating interest in serving the needs of their members. Needs include:
  - Responding to changes in discipline-based content and providing professional development training programs concerning those changes.
  - Providing opportunities for their members to participate in activities such as governance, conferences, publications, etc.
  - Recognizing the contributions of their members to the development of the discipline
- Professional organizations have a motivating interest in expanding their membership.
- Professional organizations have a motivating interest in increasing the visibility and reputation of their organizations.
- Professional organizations have a motivating interest in protecting the academic and professional integrity of the teaching of their discipline.
- Professional organizations are unlike commercial organizations (online universities, educational technology companies, etc.) whose goal is to capture the educational market and control the curriculum and the teaching of disciplines.
Supporting Documents

(Alliance Form 1)
(Alliance Form 2)
Appendix B – Supporting Documents

*Welcoming New Board Members*

*(PD_NewMember_Info)*

Dear:

The following are the names of the individuals from **System/University** who will be our representatives on the MERLOT Editorial Boards. Their contact information is also listed:

<table>
<thead>
<tr>
<th>Name</th>
<th>Editorial Board</th>
<th>Mailing Address:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Email address:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Telephone:</td>
</tr>
</tbody>
</table>

I will be sending an official letter to them to confirm their appointments and will copy you on the letter.
Board Member’s Provost Name
Address
Dear Provost Name:

Your system/university is entering into its first/second/third year of participation in the MERLOT (Multimedia Educational Resource for Learning and Online Teaching) project. MERLOT involves over 100 faculty members from 27 partner organizations across the U.S. and Canada in the development of online disciplined-based learning communities. MERLOT is a collection of high quality interactive learning materials, assignments, reviews, and people (http://www.merlot.org). Our system/university name is providing faculty reviewers for the (Disciplines Supported) learning communities.

During the Fall year and Spring year, our faculty participating in this program will be engaged in reviewing and evaluating online learning materials in their disciplines. The peer review process will provide indicators of quality with respect to content, pedagogy and ease of use for the online learning modules in the repository.

The MERLOT management team and the consortium of Project Directors developed five (5) selection criteria for members of the MERLOT Discipline Editorial Boards:

- Faculty are recognized for their expertise in the discipline,
- Faculty are recognized for their excellence in teaching,
- Faculty have experience using (and/or developing) technology in teaching and learning,
- Faculty have meaningfully participated in activities of their professional association(s),
- Faculty are willing and able to fulfill the roles and responsibilities of members of the MERLOT Discipline Editorial Boards.

We have invited New Member from your institution to be a member of the Discipline Editorial Review Board. With your knowledge and approval, we would like to make (his/her) participation in MERLOT official.

To participate in this program, New Member will assume the following responsibilities:

1. Develop Board annual goals and plans
2. Participate in the Editorial Review Board peer review process
3. Participate in the contribution of resources to MERLOT
4. Participate in the community development process
5. Attend required MERLOT meetings and teleconferences
6. Select the Classics Award winner
7. Participate in MERLOT program activities

We will reimburse him/her for his/her travel expenses related to this and we will also contribute $ of in-kind contribution to her department to cover a buy-out/course release/release time

Please acknowledge receipt of this letter by providing a statement of your approval for New Member’s participation in MERLOT through an email message to me at email address. Thank you for considering this request.

Sincerely,
Project Director name and contact information
Dear New Member:

Welcome to MERLOT! I am the Director of Academic Partner Services for MERLOT. Project Director sent me your name as a new member of the Discipline Editorial Board.

I want to tell you that this will be a great opportunity for you. The "MERLOT Community" is a very cohesive group and we’re working on a most worthwhile project. I know you will enjoy it!!!

In order to get you started with MERLOT, I would encourage you to join first, by going to: www.merlot.org and click on “Become a Member.” The only information that is required is your last name, email address and university affiliation. However, in order to build the MERLOT community, we hope you will complete the rest of the information.

Could you also please email me back to provide your complete contact information?

I would also like you to confirm that the Discipline Editorial Board is the correct place for you. Therefore, could you please share with me your areas of expertise in that email?

As soon as you confirm this information, I will be sending you a formal letter of acknowledgement and welcome from MERLOT.

In the meantime, if you have any questions about anything that has to do with MERLOT, please do not hesitate to let me know. I am also the Business Editorial Board Editor, so I have a good understanding of what goes on with the Editorial Boards.

Again, welcome to MERLOT!

Cheers,
(New_Member_Welcome)

Dear New Member:

Thank you for emailing me with your information. I am copying name of Editor on this email, as he/she/they are/is the CoEditors/Editor for the Name of Discipline Editorial Board. As stated in the letter, name of Editor will be contacting you to help you learn what you need to do as a Board Member. You will also find out when the bi-monthly teleconferences for your Board occur.

In the interim, I suggest that you begin exploring the MERLOT “About Us” feature, some of the Discipline modules, and in particular, the completed Peer Reviews in the Discipline area.

I have been working with MERLOT for the past eight years and it has been one of the most rewarding activities that I do. I have found that the support from the MERLOT staff is excellent, the people are great, and we are really working on an unusually collaborative project. I’m sure that you will share those feelings with me.

If you have any questions in the meantime, just let me know. I look forward to working with you!

Again, welcome to MERLOT!

Cheers,
Dear New Member

Congratulations! You have been nominated by System/Institution to be a member of the Discipline Editorial Board of MERLOT. The MERLOT Management Team and the consortium of Project Directors welcome you to our community. MERLOT is an international initiative enabling faculty to integrate technology in higher education. Twenty-seven systems and institutions of higher education as well as the National Science Foundation and the EDUCAUSE Learning Initiative support MERLOT.

The MERLOT project is an online community of faculty and institutions, collaborating to increase the quantity of high quality, web-based, interactive teaching and learning materials. Finding web-based materials to incorporate into one’s course is just the first step for faculty; faculty must also decide if the materials are: correct, effective teaching-learning tools, and easy to use. A continually growing collection of high-quality, online teaching and learning materials is realized through the peer review process. The MERLOT project has developed a process for the peer review of instructional technology and your expertise is critical to the success of the endeavor. Over 100 faculty members from these institutions have been performing the peer review of instructional technology, modeled after the peer review processes for research and scholarship. You can obtain more details about MERLOT at http://taste.merlot.org

The MERLOT Management Team and the consortium of Project Directors developed five (5) selection criteria for members of the MERLOT Discipline Editorial Boards.

- Faculty are recognized for their expertise in the discipline,
- Faculty are recognized for their excellence in teaching,
- Faculty have experience using (and/or developing) technology in teaching and learning,
- Faculty have meaningfully participated in activities of their professional association(s), and
- Faculty are willing and able to fulfill the roles and responsibilities of members of the MERLOT Discipline Editorial Boards.

Your position on the MERLOT Discipline Editorial Board reflects the judgment of your peers that you are an exemplar in these areas, and we are sure you will find this a rewarding commendation of your accomplishments. As MERLOT’s Director – Academic Partner Services, and representing the consortium’s interests, I offer you our sincere congratulations.

As a MERLOT Discipline Editorial Board Member, your responsibilities include:

1. Participation in the development of the Board’s annual goals and plans.
2. Participation in the Board Review Process
   a. Complete peer review training
   b. Monitor and assess the reliability of the use of peer review criteria
3. Contribute fifteen (15) resources to MERLOT as a submitter.

4. Participate in the community development process
   a. Facilitate affiliations between MERLOT and the appropriate professional disciplinary organization.
   b. Facilitate development of the MERLOT website.
   c. Identify and communicate issues impacting on MERLOT’s growth, development, etc.
   d. Identify and communicate issues associated with customization of the discipline site.
   e. Develop and implement strategies to encourage the discipline community to add comments and assignments to the site.

5. Participate in MERLOT meetings and teleconferences.
   a. Participate in Board teleconferences
   b. Attend MERLOT International Conference (MIC)
   c. Participate in online communication activities

6. Participate in the selection of the MERLOT Classics Award.

7. Participate in MERLOT program activities
   a. Use training, guidelines, tools, etc. to support the editorial board
   b. Participate in training for editors and editorial boards
   c. Engage in the scholarship of teaching
   d. Present MERLOT at professional conferences and institutional events.

Your performance as an Editorial Board Member will be a critical consideration in maintaining your position on the editorial board. Again, congratulations on this appointment. I look forward to your contributions to MERLOT and to the advancements in the teaching of your discipline and the scholarship of teaching.

Sincerely,

Director – Academic Partner Services
Dear Editor:

I have just copied you on an email that I sent to our new Board member(s) from System/University.

You will need to contact him/her to welcome him/her to your Board. He/She will also need some "mentoring" about how to get started with the review process. You will also need to let him/her know when your teleconferences are scheduled. Since each Board operates differently, one of you should be explaining things to new members.

I will take care of adding him/her to the list serve for your discipline, to the MERLOT Board Member list and also adding him/her to the contact list I send out.

The most important thing right now is to establish contact and make him/her feel welcome. Please see the suggested email that can be sent. You can personalize it any way you want.

If you have any questions, please let me know.

Cheers,
Dear New Member:

I understand that you have agreed to accept a position on the MERLOT Discipline Editorial Board. On behalf of the entire Discipline Board, I would like to welcome you to our team.

I will soon be sending you additional material regarding our review procedures. In the meantime, could you please advise me by email the areas of expertise that you will be comfortable reviewing? This will help us match your skills for our peer review needs. Also, I hope you have already joined MERLOT and begun to explore the website.

As a Board, we participate in teleconferences about every two weeks. Our next one will be date, at time and zone. I will send out an e-mail prior to the call to everyone on the board, providing the call-in details and participant code needed to join the teleconference. I hope you will be able to join us on that call.

In closing, I want to once again welcome you to our board, and please feel free to contact me if you have any questions regarding MERLOT in general or the Discipline Editorial Board in particular.

Regards,
(Editor_New_Member_Announce)

Dear **Discipline** Editorial Board:

I hope you will join me in welcoming **New Member** from **System** to the **Discipline** Editorial Board. **New Member**'s area of expertise is in **Expertise**. **He/she** will be joining us in our teleconference calls.

Presently, **he/she** is exploring the MERLOT site and looking at some of the reviews that we have done. **He/she** will also be adding some Member Comments to modules.

We are very fortunate to have (New Member) on our board and look forward to working with **him/her**.

Sincerely,
Dear New Member:

One of the best ways to begin to understand MERLOT is to review some of the Peer Reviews that have been completed by our Editorial Board. Since your area of expertise is Expertise, I think you might want to take a look at several of the Discipline reviews posted last year at the following locations:

**Web Addresses of the Reviews**

These will give you an idea of the type of review we undertake.

After you have reviewed some of these modules and reviews, I suggest that you get started by adding Member Comments to some of the modules in your discipline. I am attaching a copy of the instructions for Adding Member Comments.

After you have added Member Comments, please let me know. Once you are comfortable, we will assign a Mentor to you who will work with you on your first Review.

If you have any questions at all, please let me know.

Sincerely,

Editor's Name
(Instruction_Member_Comments)

1. Go to the **Detail View** of the Module by clicking on the Name of the Module

2. There is a box on the right called “Add your own.” Click in the box on “Write a comment”

3. Select your rating of the module by clicking on the radio button by the number of stars or “comment only.” Remember, 5 stars is the highest rating while 1 star is the lowest.

4. Next, indicate whether or not you have used the material in the classroom by clicking the appropriate radio button.

5. In the **Remarks** box, enter your comments.
   A. Follow the directions on the webpage.
   B. Comment on how you reviewed the materials (Did you spend 5 minutes browsing, 2 hours trying it, or actually use it in teaching-learning activities?).
   C. Then, comment on the three criteria:
      1. Quality of Content
      3. Ease of Use.

6. You are also encouraged to add any **Technical Comments** regarding the module.

7. **Click on Save**

   Note: It is preferable to type your comments in Word, and then spell check it for pasting it into the box.
(Instructions_Triage)

1. Click on your Workspace

2. Click on Advanced Search in Workspace (On Right)

3. There is a pull-down menu for Category – Select the MAJOR category (i.e., Accounting, Finance, etc.) and sub-category if needed

4. From the Drop Down Menu for Workflow Status, select Not Triaged

5. Click on Search – This will provide a list of those modules in the given Discipline that have not been triaged.

6. Click on the Title – This takes you to the Item Workspace

7. Click on the Title (in blue) and this opens up a new page to the actual site.

8. The important part is to review the site to see if you think it is worthy of review.

9. Then go back to the Item Workspace (that is already open)

10. You can also verify that it has not been triaged:
   a. Triage Summary – This item has 0 triage(s) for Business.

11. You can then click on Add Triage or View Triage History for this Item
   a. Add New Triage permits you to do a new triage
   b. View Triage History enables you to see what has been done in the past.

12. You can click on Add Triage, and do a triage of the module
   a. Select the rating number (4 is definitely do, 2 is Do not Review)
   b. You can also add a few Comments (please add some of these, particularly if you suggest not reviewing).

13. You can also click a box that says I am interested in reviewing this item to indicate that you would be interested in reviewing this module. At this point, this does not commit you to the module for triage.

14. Continue this way through all of the modules in your sub-discipline.
Training New Board Members

(Peer_Review_Guide)
Appendix C - MERLOT Peer Review Report

Overview

- **Description:** Peer Review Reports include seven fields that describe the teaching-learning material (Description) and six fields that evaluate (Evaluation and Observations).
  - Introduction (includes six fields and is completed after the review is finished.
  - Description
    - Overview
    - Type of Material
    - Technical Requirements
    - Learning Goal(s)
    - Recommended Use(s)
    - Target Student Population
    - Prerequisite Knowledge
  - Evaluations and Observations
    - Quality of Content
      - Strengths
      - Concerns
    - Potential Effectiveness as a Teaching/Learning Tool
      - Strengths
      - Concerns
    - Ease of Use
      - Strengths
      - Concerns

- **Guidelines:** Keep the following guidelines in mind when you are writing your peer reviews.
  - Complete all fields. If a field does not apply, write “none.”
  - Follow the guidelines for each field and include only the information that is asked for in each field.
  - Write to your primary audience – faculty searching for online materials want something they can successfully use in their courses.
  - Be comprehensive.
  - Always spell check and edit for grammar.

Introduction
o **Description:** The top part of the Peer Review Form contains some basic information to help identify the material you are reviewing. These include the Name of the Material, the MERLOT Artifact, the Material URL, Your Name, the Date the Review is Completed, and the Review Time Required.

o **Guidelines:** Make sure the correct URLs are included to help keep track of which material you reviewed. Also, the Date and Time will not be completed until you finish the review.

## The Description Fields

### Overview

o **Description:** This field contains a brief overview of the teaching-learning material. It highlights the subject matter, features, type of material, and learning goals. It provides a brief overall description that allows the user to decide if the material is worth looking into further.

o **Guidelines:** Keep the following guidelines in mind when you are writing the Overview.
  - Answer and include a description of each of the following:
    - What is the material about? What subject matter does it teach?
    - What types of learning components and features are included on the site?
    - Features might include:
      - Images/graphics
      - Video
      - Audio
      - Quizzes (with immediate feedback?)
      - Other Interactivity
      - Links to related material
      - Learning assignments
      - Teacher’s guide
      - Glossary of terms
    - What is the Type of Material? (e.g., Simulation; This should correspond to the Type of Material field. See part VI of this Guide.)
    - What are the Learning Goals? (This should correspond to the Learning Goal Field. See part III of this Guide.)
    - What is the Target Student Population? (This should correspond to the Target Student Population Field. See part IV of this Guide.)
  - Other descriptions of the material you may want to include in the Overview:
    - Reference or credit to the author or host of the material.
• A statement describing the material as part of a series of sites or learning materials (e.g., “This is the first section of a three-section tutorial.”). List the sites that follow and/or precede the material you are reviewing.
• Information about whether or not there are any costs involved in using the material.
• Additional websites by the author that might be used with the material.
  ▪ Be descriptive only. Avoid evaluative statement of the material in the Overview. Evaluations should be limited to the Evaluations and Observations section of the report.

Type of Material

  o Description: Gives the type of material using eighteen standard MERLOT categories. The choices are:

  ▪ Animation: The dynamic and visual representation of concepts, models, processes, and/or phenomena that allows users to view, on their own, such processes in space or time. Users can control the pace of the visual presentation and can step backwards and forwards through the processes being viewed, but cannot determine and/or influence either initial conditions or outcomes/results of the visual presentation.

  ▪ Assessment Tool: An assessment tool is an instrument that has been designed to collect objective data about attitudes and skill acquisition. The tool will be measuring some aspects of a domain.

  ▪ Assignment: An assignment is some type of activity designed to be used as a task for students to complete, normally outside class. It can be based on a material in MERLOT, but normally these are stand-alone activities.

  ▪ Case Study: A case study illustrates a concept or problem by using a real-life example that can be explored in depth. Normally it involves one situation or organization.

  ▪ Collection: A collection is a group of subject-specific materials; for example, a collection of web sites, images, or applets. The key to identifying it as a collection is that there are a number of materials there.
- **Development Tool**: Any tool used for development of web sites, learning objects, or anything used to develop materials. This can be a program or application used to create, debug, maintain or support other programs and applications.

- **Drill and Practice**: Drill and Practice are activities that require users to respond repeatedly to questions or stimuli presented in a variety of sequences. These exercises allow users to practice on their own and at their own pace and to develop the ability to reliably perform and demonstrate knowledge and skills.

- **E-Portfolio**: An e-Portfolio is a digital means of displaying one’s work. It is a collection of electronic documents that demonstrate skills, education, professional development and skills to a specific audience.

- **Learning Object Repository**: A Learning Object Repository is a public site at which a number of learning objects resides. Note that it is not a learning object only, but a group of them that have been selected.

- **Online Course**: An Online Course is a complete online course which would be designed for a semester or term. Users can use bits and pieces of the course as well as the entire course.

- **Open Journal Article**: An Open Journal Article is an open or free journal article that appears on the web. It may be an electronic journal or a URL that contains a journal article, either scanned or pdf.

- **Open Textbook**: An Open Textbook is a complete textbook that either is in online format, or can be downloaded by chapter or in its entirety as a pdf.

- **Presentation**: A Presentation includes lecture and presentation support materials such as presentation graphics (e.g. PowerPoint slide shows), lecture notes, or audio-visual materials that are not intended to be used outside the presentation.

- **Quiz/Test**: A Quiz/Test can be any assessment device intended to measure learning. It may be interactive, and it may also include the correct answers.

- **Reference Material**: Reference Material is similar to that found in the reference area of a library. This can include subject specific directories to other sites, texts, or general information. The material here has no specific instructional objectives.
Simulation: A simulation involves an engine that drives the dynamics of the learning material in accordance with specific rules and that simulates real phenomena. Users participate in an approximation of a real or imaginary experience where their actions affect the outcome of the activity. Users must determine and input, on their own, the initial conditions of some dynamic scenario or set of circumstances that generate an output that is different from, and changed by, the initial conditions.

Social Networking Tool: A Social Networking Tool is a tool used to build online communities of people who share interests and/or activities, or who are interested in exploring the interests and activities of others.

Tutorial: A Tutorial is sequentially organized information and activities with specific instructional objectives structured to integrate conceptual presentation, demonstration, practice, and testing to teach specific concepts or skills. Users navigate through electronic workbooks to study, practice, and be tested on information designed to meet stated learning objectives.

Workshop and Training Materials: Workshop and Training Materials may include worksheets, hand-outs or any other type of material that would be given out during a workshop or training session.

Guidelines: Keep the following guidelines in mind when you are writing Type of Material.

Choose the best Type. The Type of Material you select can be different from the Type selected by the original contributor of the material. If so, please write the correct type of material. Remember, only one Material Type is selected.

Technical Requirements

Description: Describes the technical specifications (hardware, software, network) that are required to use the learning material.

Guidelines: Keep the following guidelines in mind when you are writing the Technical Requirements.

Technical requirements include:

- Specific browser (“Best if viewed using Explorer”)
- Specific browser versions (“Must use Explorer 5.0 or greater, or Netscape 4.70 or greater.”)
- Specific operating system (“Windows XP/2000/98,” or “Not available for the Mac”)
Specific display or other settings ("Display should be set at 800 x 600")
Specific plug-ins or other software requirements ("Must have Shockwave. Download Available at site" Or "Need Adobe Acrobat Reader to view")
Java and Java-Script must be enabled on browser.

Technical requirements does NOT include:
- Technical skills of the user.
- Technical glitches or bugs.
- Technical usability issues, such as slow response time.

When technical requirements are listed on the site, state them in this field.
If specifics are not listed on site, use the following questions and guidelines to help you write the requirements:
- Is it a Java Applet? –Specify "Java enabled browser"
- Requires disc space (to download features of the site)? –Specify how much space is required.
- Requires plug-in or software? –Be as specific as you can. (popular ones include: Shockwave, Windows Media Player, Real Player, Quicktime, Flash, Adobe Acrobat Reader)

Be sure to mention the browser that you used to access the site. You do not need to try it on several browsers, but it is helpful to let users know which one you used.

Learning Goals

- **Description**: Describes the skills and knowledge the learner will acquire by using the learning material.

- **Guidelines**: Keep the following guidelines in mind when you are writing the Learning Goal(s).
  - A learning goal is knowledge or skills that the learner will gain or develop upon using the learning material. For example, a learning goal is a statement that the learner “will develop a deeper understanding...”, or “will be able to accurately identify...” A learning goal is **not** a statement that the learner will “practice”, “explore”, or “observe.”
  - **Describe** the learning goal from the perspective of the student/learner. Do not merely state the “purpose” of the site.
  - **Describe** the learning goal using your best judgment.
  - **If there is a learning goal stated on the site**, or otherwise by the author, and you feel it is clearly stated and accurate, feel free to use it. Be sure to credit the author or site by stating “As it is stated by the author (or on the site), the
learning goal is ‘...’.” Conversely, if there is a learning goal stated by the author and you do not believe it is correct, substitute your description.

**Recommended Use(s)**

- **Description**: A description of how to use the learning material, or for what purpose the site can be used.

- **Guidelines**: Keep the following guidelines in mind when you are writing the Recommended Use(s).
  - How might the materials be used in a course? Examples may be in class, as homework, as reference, etc.
  - Recommend concurrent materials or activities

**Target Student Population**

- **Description**: Description of the student population(s) who would use the learning materials

- **Guidelines**: Keep the following guidelines in mind when you are writing the Target Student Population.
  - It is important to express a **STUDENT** population, even if the learning material supports a wider range of people (from students, to faculty, to special interest groups).
  - Describe the **discipline** area (academic major, minor, program area) and their **educational level** (freshman, lower division, upper division, graduate, etc).

**Prerequisite Knowledge**

- **Description**: Describes the knowledge or skills a learner needs prior to using the learning object. This may include proficiency of a subject matter or skill.

- **Guidelines**: Keep the following guidelines in mind when you are writing Prerequisite Knowledge.
  - Be as specific or general as necessary.
  - Describe the prerequisite academic concepts and skills.
  - Describe the computer and information competence skills.
The Evaluations and Observations Fields

Each MERLOT Editorial Board defines the evaluation standards it used for its discipline. The discipline-specific evaluation standards must fit within the general evaluation standards that apply across all Editorial Boards. The following guidelines provide these general evaluation standards.

Quality of Content

- **Description:** Describes two general elements about the content of the material—its validity and its significance.

- **Guidelines:** Keep the following questions in mind when writing the strengths and concerns for this evaluation standard.
  - Use the following questions to help you evaluate and provide reasoning for your evaluation of Quality of Content.
    - Is the content valid/accurate/reliable?
    - Does it accurately depict reality?
    - Is it valid compared to convention or other resources?
    - Is the content complete in scope without missing important and relevant information?
    - Is the content current/up-to-date?
  - Does the content teach important/valuable/educationally significant concepts, models, or skills in the discipline?
    - Does the content cover core curriculum within the discipline?
    - Is the content a pre-requisite for understanding more advanced material in the discipline?
    - Does the content cover material that is difficult to teach/learn?
  - Is the validity and significance consistent throughout the material?
  - If the site contains links to other resources, are they appropriate and valid?
- Write a paragraph with “bullets” for each of strengths and concerns. You **MUST** have something in the Concerns area unless you award a rating of 5. If there are no concerns for this standard, write “none” in the field.
Potential Effectiveness as a Teaching/Learning Tool – Strengths and Concerns

- **Description:** Describes the learning material’s likely ability to improve teaching and learning given the ways faculty and students could use the material.

- **Guidelines:** Keep the following guidelines and questions in mind when writing the strengths and concerns for this evaluation standard.

  - Describe the context for using material. Defining the purpose of the learning material is critical to evaluating its potential effectiveness. You can describe if the materials can be used as (1) an explanation or description of the problem, (2) a demonstration or exploration of the problem, (3) a practice problem, or (4) an application to “new” problems.

  - Describe how using the material enhances the quality of the teaching and learning process.
    - Does the material facilitate learning? Will learners be able to effectively achieve the learning goals?
    - Are concepts, models, or skills presented with clarity, focus, and organization?
    - Compared to other methods of teaching the same concept, models, or skills, is this learning material just as effective or better? Is it an innovative, new, original presentation of the concept?
    - Does it engage the learner, create intrigue, or otherwise motivate the learner to achieve?
    - Does it appeal to multiple learning styles? Multiple learning processes?
    - Does it engage multiple senses through audio, video, images, and text?
    - If it is interactive, does it do so effectively?
    - If it is interactive, does it provide immediate feedback regarding the learner’s response accuracy?
    - Does it provide examples when appropriate that help illustrate concepts?
    - Does it demonstrate relationships between concepts?
    - Does it provide effective introductions, overviews and summaries when applicable?
    - Does it have flexibility or versatility of use?

  - Write a paragraph with “bullets” for each of strengths and concerns. You **MUST** have something in the Concerns area unless you award a rating of 5. If there are no concerns for this standard, write “none” in the field.
Ease of Use—Strengths and Concerns

- **Description:** Describes how easy it is for students and faculty to interact with the learning material.

- **Guidelines:** Keep the following questions in mind when writing the strengths and concerns for this evaluation standard.
  - Describe the features of the material that makes it easy to use
    - Is information presented in ways that are familiar to students?
    - Is the material easy to navigate?
    - If it is interactive, does it provide feedback for user actions? Will the user always know if they are waiting for a response from the system, or if the system is waiting a response from the user?
    - Is it self-contained, or are instructions necessary?
    - If there are instructions or “help”, are they clear, relevant, and complete? Are they available when needed?
    - If applicable, does it clearly tell users when an error is made, and how the user should continue?
    - Is the presentation clearly designed with no distracting design elements (e.g., color, animation, too much on a page)?
    - Are the terms/new jargon, defined?
    - Are related parts of the site clearly related, while parts that offer different content areas, or audiences are clearly separated?
    - When the site requires plug-ins, does it provide links to easily access the plug-in for downloading?
    - Are there any major bugs (e.g., links that do not work)
  
  - Write a paragraph with “bullets” for each of strengths and concerns. You MUST have something in the Concerns area unless you award a rating of 5. If there are no concerns for this standard, write “none” in the field.

- **Star Ratings**

  - **Description:** Peer Reviewed materials are rated 1 – 5 stars, with 5 stars having the highest excellence, for each evaluation standard and overall. You can assign ratings in .25 increments. The purpose for these ratings is not to take the place of text in the peer review report, but to act as search indicators. Users of MERLOT are able to search or sort materials by number of stars. The rating scheme is as follows:
    - 5 Stars: The material is excellent all around.
4 Stars: The material is very good overall but there are a few minor concerns.

3 Stars: The material meets or exceeds standards, but there are some significant concerns.

2 Stars: The material does not meet minimal standards, but might have some limited value.

1 Star: The material is not worth using at all.

**Examples:** Rating the three evaluation standards (Quality of Content, Potential Effectiveness, and Ease of Use) allow users to separate the different aspects of the learning material. Three combinations of ratings are provided below as examples:

- **Example 1:** High Quality, High Potential Effectiveness, and Low Ease of Use. Possible interpretation: Good curriculum but will require extensive user support and training.

- **Example 2:** Low Quality, Low Potential Effectiveness, and High Ease of Use. Possible interpretation: Bad curriculum but easy for a new users to get accustomed to using instructional technology.

- **Example 3:** Medium Quality, Low Potential Teaching Effectiveness, and High Ease of Use. Possible interpretation: Materials are accurate and easy to navigate but require extensive background knowledge.

In all three examples, people reading the reviews should be better informed about how they might (or might not) use the material in their classes.

**Guidelines:** What constitutes excellence and minimal standards for each of the three criteria and the material overall will be determined by each Editorial Board. However, the criteria are the same for each Editorial Board discipline.

**Additional Information**

- **Description:** There are five additional fields that are completed: The overall rating, the Additional Information and the Information for the Author.

- **Guidelines:** The overall rating is created as an average of the three ratings: Quality of Content, Potential Effectiveness as a Teaching/Learning Tool, and Ease of Use. Each of the criteria is considered of equal weight.
  - Determine the average rating.
Additional Information is material that you want to include in the Peer Review, but you did not have a place to add it. The information will appear along with the Peer Review.

Information for the Author is material that you want to send to the author. It can include some suggestions for improvement, or even praise for the work. This will be sent to the author, but will not appear with the review.
Dear New Member:

I hope you have had time to look through the Peer Review Guidelines and understand how we go about doing the Peer Review.

I am assigning Board Member to be your Mentor as you work on your first few reviews. He/She will be available to help you as you complete your Individual Peer Review. His/Her contact information is Contact Information.

If you have any questions, please contact your Mentor or me at any time. We look forward to working with you.

Sincerely,
Editor
(Mentor_New_Member)

Hi, Member Name:

I am going to be your mentor as you work through your first several reviews with MERLOT. I have been working with MERLOT for number years, and have been where you are now, so I hope I can answer any of your questions.

We normally review at least one review per month, on average. However, your first review will take a while. Once you begin to become familiar with our processes you will find that it becomes a lot easier. If you have any questions at any time, please let me know.

I know you will enjoy your affiliation with MERLOT. Not only have I made some good friends, but I have learned about how other professors teach their classes and it has definitely benefited me as a professor.

Again, if you have any questions, please let me know. I look forward to working with you.

Sincerely,

Board Member
Dear New Member:

You are ready to do your first review for MERLOT.

We would like you to review the module, “Name of Module” which can be found at the following MERLOT site:

link to Detail view of Module

The actual site for the module is:

link to actual site of module

I am attaching the following for you:

1. A copy of our Rating Form
2. Instructions for completing the Form
3. Instructions for adding the review to MERLOT workspace

We hope that you will be able to complete the review by date. As you know, Board Member Mentor Name is available to help you through your first review.

If you have any questions, or need any assistance, please let me know. I look forward to working with you.

Sincerely,
Co-Editor or Associate Editor
How to Complete a Peer Review Report Using the (Business) Review Form

If you are on this page, you have obviously been selected by one of the Business Discipline Editorial Review Board members to conduct a peer review of a MERLOT module. One of the Members has contacted you and requested that you review a particular module. Although other reviewers will also be conducting the review, you will conduct the peer review independently. However, if you have any questions, feel free to ask the Editor or the Associate Editor with whom you are doing the review.

If you are not a Member of MERLOT, go to the MERLOT site (www.merlot.org) and become a member. Click on “Become a Member” on the left side of the homepage. In order to develop a community of scholars, it is helpful if you provide all of the requested information, even though the required information is only your last name and email address.

While there is obviously no "best way" to approach a peer review, below is a procedure suggested by several experienced MERLOT reviewers.

Review Procedure

1. Save the Latest Review Form (v11)
2. Open that review form and type the name of the module.
3. Save it on your hard drive as the name of the module. (I.e. LearningStylesQuestionnaire.doc)
4. Print the Review Form

The First Step – the Overview Review

1. Log on
2. Go to Browse Mat
   a. Can search by Name
   b. Can search by Sub-Discipline
3. Click on Module name to go to Detail View.
   a. Read information there.
   b. If there are Member Comments, read them.
   c. Go to URL.
4. Initial Review
   a. Briefly work through the module
   b. Explore all assets of it
   c. If links are provided, see if they work
   d. Take general notes on printed Review Form for:
      i. General Description
      ii. Major Learning Goals
      iii. Target Student Population
The Second Step: The Indepth Review

1. Work through the module again, this time more slowly
2. Use the review sheet to make notes about your opinions of
   a. Quality of Content
   b. Potential Effectiveness as Teaching Tool
   c. Usability
3. After working through the module and the assignment, use the Printed Review form to determine your rating for each of the statements under the three main categories.
4. Once the individual statements have been rated, determine your Overall Rating for each of the major constructs:
   a. Quality of Content
   b. Potential Effectiveness as Teaching Tool
   c. Usability
5. Based on the notes you have made, determine the Strength(s) and Weakness(es) in each of the three areas. NOTE: This is the major part of the review that will appear on the MERLOT Webpage, so please be explicit and complete for this part):
   a. Quality of Content
   b. Potential Effectiveness as Teaching Tool
   c. Usability
6. The final step should be your determination of the Overall Rating for the Module, based on the above information.
7. Add any general notes that will become part of the review.
8. Add any notes to the author that will be available only for the author to see.

The Last Step: The Final Printed Review Form

1. Go to: your saved Review Form (on your hard drive)
2. Type in the information at the beginning
   a. General Description
   b. Major Learning Goals
   c. Target Student Population
   d. Prerequisite skills
   e. Type of Material
   f. Recommended Uses
   g. Technical Requirements
3. Type in the Overall Rating
4. Type in the Quality of Content:
   a. Overall Rating
   b. Strengths
5. Type in the Potential Effectiveness as a Teaching Material:
   a. Overall Rating
   b. Strengths
   c. Concerns
6. Type in the Usability
   a. Overall Rating
   b. Strengths
   c. Concerns
7. Type in the Other Comments
8. Type in the Information to the Author
9. Save this.
10. **Important**: Please Spell Check and Grammar Check in Word, and then save again.
## Review Form

<table>
<thead>
<tr>
<th>Name of Module: (As it appears in MERLOT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>MERLOT Artifact URL: (From MERLOT Detail View)</td>
</tr>
<tr>
<td>Module URL: (Module site – from author)</td>
</tr>
<tr>
<td>Your Name:</td>
</tr>
<tr>
<td>Date Review Completed:</td>
</tr>
<tr>
<td>Review Time required:</td>
</tr>
</tbody>
</table>

**Description**

1. **Descriptive Overview:** Describe subject matter, features and descriptions, uses and applications.

2. **Type of material:** animation, assessment tool, assignment, case study, collection, development tool, drill and practice, e-portfolio, learning object repository, online course, open journal article, open textbook, presentation, reference material, simulation, social networking tool, quiz/test, tutorial, workshop and training material

3. **Technical requirements:** Browser, Software or plug-in, Java, HTML, Flash, etc. You can test how it appears on Internet Explorer at: [http://ipinfo.info/netrenderer/](http://ipinfo.info/netrenderer/)

4. **Identify Major Learning Goals:** Purpose of site, goal for learner/user. (State from student’s perspective)

5. **Recommended use(s):** In class, homework, individual, team, lecture, etc.

6. **Target Population:** Level, course or subject matter, other user groups.

7. **Prerequisite knowledge or skills needed:** Course or subject matter, computer skills, other miscellaneous skills.
Evaluation and Observations: After reviewing the Module, please indicate your agreement with the following statements by placing a point value in .25 increments in the applicable column, where 5 = Excellent or strongly agree and 1 = Poor or Strongly Disagree.

<table>
<thead>
<tr>
<th>Quality of Content - Module...</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neither Agree Nor Disagree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Please use .25 increment rating scale)</td>
<td>5 4-4.75</td>
<td>3 -3.75</td>
<td>2-2.75</td>
<td>1-1.75</td>
<td>NA</td>
<td></td>
</tr>
</tbody>
</table>

A ...is clear and concise

B ...provides a complete demonstration of the concept

C ...demonstrates a core concept grounded in the discipline

D ...is current and relevant

E ...is informed by scholarship

F ...is self-contained (can be used without requiring an assignment or context)

G ...provides accurate information

H ...is flexible (can be used in several situations)

I ...includes an adequate amount of material

J ...summarizes the concept well

K ...integrates the concept well

Overall, the quality of content is very high:

L Please enter numeric value that summarizes your attitudes above. It needs to be in .25 increments

Strengths: Describe the outstanding features of the quality of the module.

Concerns: Describe any problems in terms of quality. NOTE: When a rating is < 5, concerns must be identified.

Potential Effectiveness as a Teaching Tool/ Module...

(Please use .25 increment rating scale)

<table>
<thead>
<tr>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neither Agree Nor Disagree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>5 4-4.75</td>
<td>3 -3.75</td>
<td>2-2.75</td>
<td>1-1.75</td>
<td>NA</td>
<td></td>
</tr>
</tbody>
</table>

A ...identifies learning objectives

B ...identifies prerequisite knowledge

C ...reinforces concepts progressively
<p>| | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td>...builds on prior concepts</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>...demonstrates relationships between concepts</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F</td>
<td>...is easy to write assignments for</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G</td>
<td>...is very efficient (could learn a lot in short time)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>H</td>
<td>Overall, module is a very effective teaching tool;</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Strengths:** Identify the outstanding features of the module for student learning.

**Concerns:** Describe module in terms of student learning. **NOTE:** When a rating is < 5, concerns must be identified.

### Ease of Use - Module...

*(Please use .25 increment rating scale)*

<table>
<thead>
<tr>
<th></th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neither Agree/Nor Disagree</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>4 – 4.75</td>
<td>3 - 3.75</td>
<td>2 - 2.75</td>
<td>1 - 1.75</td>
<td>NA</td>
<td></td>
</tr>
</tbody>
</table>

<p>| | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>...is easy to use</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>...has very clear instructions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>...is engaging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>D</td>
<td>...is visually appealing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>E</td>
<td>...is interactive</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F</td>
<td>...is of high design quality</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G</td>
<td>Overall, the usability of this module is very high</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Please enter numeric value that summarizes your attitudes above. It needs to be in .25 increments</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Strengths:** Indicate the outstanding features of the usability of the module.

**Concerns:** List problems in terms of usability. **NOTE:** When a rating is < 5, concerns must be identified.

4. What is your overall numeric rating for this module? Review your 3 ratings above and determine your overall rating in .25 increments.

**Additional Information:**

CS – 6/11
<table>
<thead>
<tr>
<th><strong>Other comments to be included in the review</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Comments to Author Only</strong> <em>(For authors view only. Any needed improvements or recommendations should be addressed here).</em></td>
<td></td>
</tr>
</tbody>
</table>
Instructions on Workspace

1. To make your review final, Go to www.merlot.org

2. Log in

3. Go to Browse Materials
   a. Can search by Name
   b. Can search by Sub-Discipline

4. Click on Module name to go to Detail View

5. If you have been assigned the module, over on the right side, there is Material Workspace.
   a. Click on this.
   b. This will take you to your Personal Workspace for this module.
   c. The Status should read “Assigned on (date).”

6. Clicking on the pencil will take you to the Review space.

7. In order to enter the Review into the system, you will need to Cut and Paste from your Word document to this.

8. Please cut and Paste all parts of the Review.

9. Please note, that if you don’t finish this in one setting, you can go to “Save for Later.”

10. This is then saved and you are the only person who has access to this.

11. When you Save for Later, the next time you go into the Material Workspace, it will read “Started on (date).”

12. If you Click on then you can Resume or go back and make changes.

13. When you have completed the Review, Click on “Submit Final Copy.”

14. Now, when you look back in the Item Workspace, it will say that you have the Review was “Completed on (date).”
Dear New Member:

I hope you have been enjoying your opportunity to review for MERLOT. I have reviewed both your Individual Review and the Consolidated Review of the module, “Name of Module”.

First, thank you for taking the time to complete the review. This can be a demanding process and we appreciate the help that you have provided.

My comments on your review are:

Your comments

Again, we appreciate your hard work and look forward to your working with us on the scholarship of teaching.

If you ever have any questions, please do not hesitate to let me know.

Sincerely,

Editor
**Promoting Board Members**

(*PD_Associate_Promotion*)

Dear *Board Member*:

I want to take this opportunity to congratulate you because you have been recommended as an Associate Editor for the *Discipline* Editorial Board. You were recommended for this position by both the Editor and by me.

As you know, the Associate Editor position requires good leadership and management skills. We believe you will be a very good representative of our *system/university* and have complete confidence in you for handling this position.

The Director – Academic Partner Services for MERLOT will be contacting you separately to inform you of the additional responsibilities that you will have in this position.

Sincerely,

*Project Director*
(DAPS_Associate_Promotion)

Dear Board Member:

Congratulations! Because of your superior efforts with the MERLOT project, you have been promoted to Associate Editor of the Discipline Editorial Review Board. Both your Editor and Project Director have recommended you for this promotion.

It is only through the hard work and commitment from our team members that we are able to reach the level of peer reviews that we have completed this past year. Much of this success can be attributed to the effort you put forth in reviewing modules, triaging, working with External Reviewers, and making presentations on MERLOT.

As an Associate Editor, your responsibilities will change. You will be responsible for handling part of the Peer Review process for the Discipline Board. As Associate Editor, you will be responsible for recruiting Peer Reviewers and for making presentations at professional organizations. You will also be mentoring new members to our Editorial Board.

The role of Associate Editor has some additional responsibilities from those of a Peer Reviewer. You will also be responsible for the following:

1. Participating in the Peer Review Process
   a. Direct the implementation of the peer review process
   b. Use MERLOT tools to organize the review process
   c. Recruit and train peer reviewers.
   d. Facilitate the communications of the editorial board
   e. Facilitate the communications between authors of materials under review and the work of the editorial board

2. Participate in the Editorial Board Collection Development process
   a. Coordinate collection development process
   b. Assess effectiveness of categorization scheme, sub-categories and resource types
   c. Lead the expansion of the size and depth of collection

3. Participate in the Community Development Process
   a. Facilitate affiliations between MERLOT and the appropriate professional disciplinary organization
   b. Facilitate development of the MERLOT website
   c. Identify and communicate issues impacting on MERLOT’s growth, development, etc.
   d. Identify and communicate issues associated with customization of discipline site.
   e. Lead the development and implementation of strategies to encourage the discipline community to add comments and assignments to the site.

4. Attend MERLOT meetings and teleconferences
   a. Attend the MIC business meeting
   b. Participate in online communication activities

5. Participate in MERLOT program activities
   a. Help lead the Board in accomplishing its activities
b. Participate in training for editors and editorial boards

As we become an international organization and word about MERLOT spreads, people external to the MERLOT process will recognize the work you have done. I want you to know that many of us already recognize and appreciate your hard work and many contributions.

Sincerely,
Director – Academic Partner Services

cc: Project Director
    Editor
(Associate_Announce)

Dear Editorial Board Members and Peer Reviewers:

I am pleased to announce that Board Member Name has been promoted to Associate Editor by MERLOT. Board Member Name was recommended by both his/her system/campus and myself.

As part of this promotion, Board Member will assume responsibility for the Sub-Discipline within our Board. He/she will be contacting Peer Reviewers and making the assignments for peer review. He/she will also be responsible for expanding the collection of modules in the Sub-discipline area. He/she will also be contacting additional individuals to participate as Peer Reviewers.

I hope you will recognize him/her for this promotion and join me in congratulating him/her.

Sincerely,
Editor
Dear MERLOT Peer Reviewer:

I want to thank you for your assistance in conducting the Peer Review Process with MERLOT. We now have over Number Peer Reviews of MERLOT modules in the Discipline discipline, and the collection continues to grow.

I have recently been working with you as the Editor of the Discipline discipline. In moving to the true "journal review model," we have recently appointed several people as Associate Editor within the Discipline discipline.

I am pleased to announce that Name of Reviewer has been appointed as the Associate Editor for Sub-discipline within the Discipline discipline. Name of Reviewer is a Type of Professor at name of schools and comment on professional expertise, Name of Reviewer has been a volunteer Peer Reviewer for MERLOT for XX years and has contributed some of his/her own modules to MERLOT. She/he has a very good understanding of MERLOT and what is required for a high quality module. Her/his person profile at MERLOT is located at:

List URL for personal profile

Name of Associate Editor will now be working with you in assigning modules for review. He/She will also send you reminders of when those reviews are due and will provide any kind of assistance you need. Of course, you can still contact me if you have any special questions, but I'm sure you'll find that Name of Associate Editor will be able to solve all your problems.

I hope you join me in congratulating Name of Associate Editor on this appointment.

Cheers,

Editor
Instructions for Tracking Editorial Board Members.

1. Go to the MERLOT Homepage and make sure that you have logged in.
2. Click on “My Workspace” on the right.
3. Click on “Manage People” on the right.
4. Under “Run Reviewer Report,” highlight the individual’s name.
5. Select the Begin date of the evaluation
6. Select the End date of the evaluation
7. Select the format you prefer
   a. HTML will provide the report in a webpage
   b. PDF is probably the clearest.
   c. CSV is the clearest in a spreadsheet
   d. XLS is an Excel spreadsheet and can be added to.
8. Select the next person and complete 5 through 7.
Editorial Board Goals for 2007-2008

<table>
<thead>
<tr>
<th>Editorial Board:</th>
<th>Editor(s):</th>
</tr>
</thead>
</table>

NOTE: **Goal Setting** involves setting specific, measurable and time targeted objectives. To be most effective goals should be tangible, specific, realistic and have a time targeted for completion. There must be realistic plans to achieve the intended goal.

### Community Building:

<table>
<thead>
<tr>
<th>Goal</th>
<th>Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Goal</th>
<th>Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
</tbody>
</table>

### Collection Management:

<table>
<thead>
<tr>
<th>Goal</th>
<th>Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Goal</th>
<th>Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
</tbody>
</table>

### Peer Review:

<table>
<thead>
<tr>
<th>Goal</th>
<th>Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Goal</th>
<th>Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
</tbody>
</table>
Other Goals:

<table>
<thead>
<tr>
<th>Goal</th>
<th>Strategies</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3</td>
</tr>
<tr>
<td>2.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3</td>
</tr>
<tr>
<td>3.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3</td>
</tr>
</tbody>
</table>
Conducting the Peer Review Process

(Peer_Reviewer_Reminder)

Dear (Peer Reviewer):

I just wanted to remind you that your review of “Module Name” is due in one week, (due date). If you have any questions about the review, please let me know.

Sincerely,

(Associate Editor)
Date

Name and Address of Author

Dear Author:

Your scholarly work in instructional technology from has been peer reviewed and published in MERLOT – the Multimedia Educational Resources for Learning and Online Teaching). The MERLOT project is an international initiative enabling faculty to integrate technology into higher education. MERLOT is supported by 21 systems and institutions of higher education as well as the National Science Foundation. MERLOT is also endorsed by EDUCAUSE Learning Initiative (ELI). Over 100 faculty from these institutions have been performing the peer review of instructional technology, modeled after the peer review processes for research and scholarship. The peer review report written by the MERLOT Business Editorial Board is published on the MERLOT website and presented below.

The MERLOT project (http://www.merlot.org) is an online community of faculty and institutions collaborating to increase the quantity of high quality web-based, interactive teaching and learning materials. The MERLOT website is a free “gateway” for these web-based materials. Finding web-based materials to incorporate into one’s course is just the first step for faculty; faculty must also decide if the materials are correct, effective teaching-learning tools, and easy to use. A continually growing collection of high quality online teaching and learning materials is realized through a peer review process and samples of student learning assignments that make the most of the interactive materials. MERLOT conducts the peer review of online materials and ensures reliable and valid reviews through the selection and training of the editorial board members as well as on-going support for the review process. You can obtain more details about the MERLOT project, the peer review process, and evaluation standards at http://taste.merlot.org

The MERLOT _____________ Editorial Board identified your work as worthy of peer review and assigned two (2) MERLOT _____________ Editorial Board to review work using the three review guidelines:

1. Quality of content.
2. Potential effectiveness as a teaching-learning tool.
3. Ease of use

Members of the Editorial Board communicate with the authors to ensure comprehensive review of the materials. The reviews are posted on the MERLOT website and the learning material is featured as a learning object of the week on the MERLOT ________________ Discipline home page.

The Peer Review Report of your work can be found at:
In summary, the MERLOT Name of Editorial Board wishes to acknowledge the valuable contributions you have made to advancing the teaching and learning within the Name of Discipline. Your work is a model of the scholarship of teaching that can benefit faculty teaching and students around the world.

Sincerely,
(Editor’s name and contact information)
(Designee_Letter)

Date:

Author’s Designee
Address

Dear ___________

The scholarly work in instructional technology of Author’s Name from Name of Institution has been peer reviewed and published in MERLOT – the Multimedia Educational Resources for Learning and Online Teaching. The MERLOT project is an international initiative enabling faculty to integrate technology into higher education. MERLOT is supported by 21 systems and institutions of higher education as well as the National Science Foundation. MERLOT is also endorsed by National Learning Infrastructure Initiative of EDUCAUSE. Over 100 faculty from these institutions have been performing the peer review of instructional technology, modeled after the peer review processes for research and scholarship. The peer review report written by the MERLOT (Discipline) Editorial Board is published on the MERLOT website and presented below.

The MERLOT project (http://www.merlot.org) is an online community of faculty and institutions collaborating to increase the quantity of high quality web-based, interactive teaching and learning materials. The MERLOT website is a free “gateway” for these web-based materials. Finding web-based materials to incorporate into one’s course is just the first step for faculty; faculty must also decide if the materials are correct, effective teaching-learning tools, and easy to use. A continually growing collection of high quality online teaching and learning materials is realized through a peer review process and samples of student learning assignments that make the most of the interactive materials. MERLOT conducts the peer review of online materials and ensures reliable and valid reviews through the selection and training of the editorial board members as well as on-going support for the review process. You can obtain more details about the MERLOT project, the peer review process, and evaluation standards at http://taste.merlot.org

The MERLOT Name of Editorial Board identified Name of Author work as worthy of peer review and assigned at least two (2) MERLOT Name of Editorial Board to review work using the three review guidelines:
1. Quality of content.
2. Potential effectiveness as a teaching-learning tool.
3. Ease of use

Members of the Editorial Board communicate with the authors to ensure comprehensive review of the materials. The reviews are posted on the MERLOT website and the learning material is featured as a learning object of the week on the MERLOT Name of Discipline home page.
The Peer Review Report of *Name of Author's* work can be found at:

**URL for catalogue Record**

In summary, the MERLOT *Name of Editorial Board* wishes to acknowledge the valuable contributions *Author Name* has made to advancing the teaching and learning within the Business discipline. *Author Name* work is a model of the scholarship of teaching that can benefit faculty teaching and student learning at *Institution Name* and around the world.

Sincerely,

Editor's name and Contact Information
Dear Professor:

Attached you will find a letter recognizing the contributions to teaching and learning of Professor First and Last Name. He/She recently add one of his/her learning materials reviewed by the Discipline Editorial Board of MERLOT.

You should be proud to have a colleague like Professor Last Name at your institution.

Sincerely,

Editor Name
Recruiting and Selecting Peer Reviewers

(Peer_Reviewer_Email_Thanks)

Informal Thank you for volunteer Peer Reviewer

Dear (Peer Reviewer):

That you again for agreeing to review the module, Name of Module for MERLOT. I have viewed your Individual Review and believe you have done a great job.

Could you please advise me by return email how frequently you are willing to review for us, (i.e., once per month, twice per semester, etc.)?

Thank you again for your assistance.

Sincerely,

Associate Editor
Email to send with Letter of Acknowledgement to volunteer Peer Reviewer

Dear volunteer Peer Reviewer:

I am attaching a formal letter of acknowledgement for your completion of the Peer Review of **Module Name**.

Again, I thank you for your help in increasing the number of peer reviewed modules on the MERLOT site. It is only through your help that we have been able to expand our collection.

I look forward to working with you again in the future.

Sincerely,

Editor
Peer Review Letter of Acknowledgement

Thank you for the contribution you made as a Peer Reviewer for MERLOT (Multimedia Educational Resources for Learning and Online Teaching). The MERLOT project is an international initiative enabling faculty to integrate technology in higher education. Twenty three systems and institutions of higher education as well as the National Science Foundation support MERLOT. The National Learning Infrastructure Initiative of EDUCAUSE also endorses MERLOT. Over 100 faculty from these institutions have been performing the peer review of instructional technology, modeled after the peer review processes for research and scholarship.

The MERLOT project is an online community of faculty and institutions collaborating to increase the quantity of high quality, web-based, interactive teaching and learning materials. Finding web-based materials to incorporate into one's course is just the first step for faculty; faculty must also decide if the materials are correct, effective teaching-learning tools, and easy to use. A continually growing collection of high quality online teaching and learning materials is realized through the peer review process.

Your assistance with the peer review of “Name of Learning Resources” is greatly appreciated. The Final Peer Review can be found on the MERLOT website at: URL for review

The MERLOT Name of Discipline Editorial Board wishes to acknowledge the valuable contributions you made to advancing teaching and learning within the Name of Discipline. Your participation in the Peer Review process helps to ensure a large quantity of high quality teaching and learning materials.

Thank you for your hard work.

Sincerely,
(Editor’s Name and Contact information)
Hi,

Welcome to MERLOT! I am the Editor for the Discipline Editorial Board. I hope you will utilize our resource, as we have a number of different modules on the system. We have continued to add learning materials and hope you use them in your classes. If you have anything of your own to contribute, please do so.

The MERLOT site has been updated with easier to locate materials, and improvements are continually being made. As a member of MERLOT, you are able to add modules, add learning assignments, and add member comments. On the “About Us” tab of the Home Page are links that help to explain the material that is available from MERLOT. We also encourage you to join the Virtual Speakers Bureau or to find a Guest Expert for your classes.

The Discipline Editorial Review Board has been working to populate the site with modules and reviews. I encourage you to see what we now have to assist you in your teaching. Click on the link to Business to view the categories. Or, search for a specific topic. Within the Business Discipline, we now have:

- Over Number Members
- Over Number Learning Materials
- Over Number peer reviews of those modules

Additionally, from the Home Page, under Visit a Discipline Community, you can access Teaching and Technology, which provides resources for those teaching online courses such as: Assessment, Research & Scholarship, Teaching Strategies, etc. You can also access the Discipline Community Portal.

Finally, the Discipline Editorial Review Board is now using volunteer Peer Reviewers to assist in the review of the materials. As a Peer Reviewer, you are provided training and assistance. After the final Peer Review is posted in MERLOT, you receive a letter of recognition. If you are interested in serving as a Peer Reviewer, please contact me at: cswift@calstate.edu. Peer Reviewers who complete 5 or more Peer Reviews during the year are invited to be honorary Editorial Board Members for the following academic year.

MERLOT has continued as an excellent resource for obtaining course materials and ideas. The collaboration between authors, users, reviewers, and board members has produced a great community. We hope you will be an active user. Let us know if there is anything else you would like to see as a
Again, thanks for joining!

Sincerely,

Editor

Contact Information
Click to add title

- Click to add text
Dear Name:

As you may have heard, I have been involved with MERLOT (Multimedia Educational Resource for Learning and Online Teaching) for the past number years. What you may not know is that MERLOT is a free and open resource, and the materials can be used in any class – face to face as well as online. One of the unique features of MERLOT is the fact that we conduct peer reviews of teaching materials. Instructors are increasingly being asked to document their “teaching scholarship” to satisfy accreditation standards. Other than student evaluations, the only documentation pieces that instructors have are syllabi, self-written documents, etc.

With MERLOT, instructors can have their learning materials (simulations, lesson plans, learning activities, resources) peer reviewed and receive recognition for the hard work that goes into preparing those modules. The fact that the System or Campus is one of 27 contributing partners to MERLOT indicates the support and regard that our institution has for the MERLOT Peer Review process.

As Editor of the Discipline Review Editorial Board, I work with the Editors of the other fifteen Disciplines, one of which is Person’s Discipline. I suggest you see what we now have to assist you and your department instructors in teaching. I encourage you to visit the MERLOT website at: http://www.merlot.org

There are over number of learning objects on the MERLOT website. Additionally, from the Home Page you can access the Person’s Discipline Portal which has specific guidelines, links etc. to your area.

MERLOT has continued to receive recognition as an excellent resource for obtaining course materials and ideas. The collaboration between authors, users, reviewers, and board members has produced a great community. I urge you to become part of that community. You can participate in MERLOT in several ways:

1. As a MEMBER:
   a. You and your faculty can “join” the MERLOT community by providing only your last name and email address. (We would like to see more information, of course). Click on the link to Person’s Discipline to view the categories. Or, search for a specific topic. You will see that the modules are classified by topic: Subcategories. Within each of these, there are further categories.
   b. The modules are automatically listed by order of peer review. Those receiving the highest review are listed first. This way you can view only those with the highest ratings.

2. As a CONTRIBUTOR:
   a. You and your faculty can add material of your own to MERLOT:
      i. Modules that you have developed can be added and you can request that they receive a Peer Evaluation. When the module is reviewed, the author
is able to designate two recipients of a recognition letter (provost, dean, department chair, etc.).

ii. You can add Learning Assignments to modules that have already been added. Assignments are directions for students that use a particular module in class or a homework assignment.

iii. You can add Member Comments after reviewing a module or using it in your class.

b. All of these become part of your MERLOT “Member Profile” which can be used in a Teaching Portfolio, Annual Report, or P&T package. Additionally, the letter you receive when a module is Peer Reviewed can be used in the same manner.

3. As an volunteer PEER REVIEWER:
   a. All of the Disciplines Editorial Boards are seeking Peer Reviewers.
   b. The Person’s Discipline Editorial Board operates much like a journal editorial board. The Editor, assigns reviews to Associate Editors. The Associate Editors work with Peer Reviewers to ensure that the reviews are done. Additionally we train the Peer Reviewers through our Peer Review Tutorial.
   c. Once the peer review is posted to MERLOT, the Peer Reviewer receives a recognition letter for his/her contribution to the scholarship of teaching. This can be viewed as a “Service to the Discipline” or to “Teaching” activity. Again, the document is useful for a Teaching Portfolio, Annual Report, or P&T package.

MERLOT has received several grants from the National Science Foundation, with several others pending. Additionally, MERLOT has initiated a number of alliances and partnerships with a variety of organizations.

MERLOT is becoming recognized more each day in the International Person’s Discipline Community. I encourage you to become a part of the Person’s Discipline Community, as a User, Contributor, and/or Peer Reviewer. Additionally, I suggest that you share this information with your faculty and encourage them to contribute their modules to MERLOT. We are particularly seeking volunteer Peer Reviewers, who should contact the Person’s Discipline Editor, at

Email of editor of discipline

If you have any questions, please let me know.

Cheers,

Editor’s Name

Position
# Building Relationships with Professional Associations

(Alliance_Form1)

## Recommendations for Affiliations

<table>
<thead>
<tr>
<th>Background Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name</td>
<td></td>
</tr>
<tr>
<td>Organization Contact Information (phone, email)</td>
<td></td>
</tr>
<tr>
<td>Organization Address</td>
<td></td>
</tr>
<tr>
<td>Does the organization currently exist as a “relationship” – e.g. - a link off a discipline portal?</td>
<td></td>
</tr>
<tr>
<td>With which discipline is this organization most closely linked or might this be a new one?</td>
<td></td>
</tr>
<tr>
<td>If there already is a relationship, why should it evolve into an Alliance?</td>
<td></td>
</tr>
<tr>
<td>Has the organization expressed interest and willingness to pursue an Alliance?</td>
<td></td>
</tr>
<tr>
<td>Do you have a personal connection with the organization to enable you to facilitate exploratory discussions about an Alliance? If so, please describe</td>
<td></td>
</tr>
<tr>
<td>Provide a brief description of the organization’s membership.</td>
<td></td>
</tr>
<tr>
<td>Provide a brief description of the shared values and mission with MERLOT?</td>
<td></td>
</tr>
<tr>
<td>What are 2 primary mutual benefits that can result from an Alliance?</td>
<td></td>
</tr>
</tbody>
</table>
Do you know if the professional organization possesses a digital library collection?

(Alliance_Form2)

Recommendations for Affiliations

<table>
<thead>
<tr>
<th>EXAMPLES OF POTENTIAL MUTUAL ACTIVITIES WITH PROFESSIONAL ORGANIZATIONS (PO) (Optional Information)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACTIVITY</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td>If the PO possesses a digital library collection, do you know how big it is?</td>
</tr>
<tr>
<td>Does the PO wish to deploy Federated Search of the MERLOT repository from their website?</td>
</tr>
<tr>
<td>Does the PO wish MERLOT to build a Federated Search to the POs' repository?</td>
</tr>
<tr>
<td>Does the PO wish TO invite MERLOT members to participate in the organization’s activities?</td>
</tr>
<tr>
<td>Does the PO wish to deploy custom RSS feeds?</td>
</tr>
<tr>
<td>Does the PO wish to publish MERLOT peer review reports in their journals/newsletters?</td>
</tr>
<tr>
<td>Does the PO wish to schedule sessions at their conferences for MERLOT discipline teams to present their work?</td>
</tr>
<tr>
<td>Can MERLOT schedule sessions at the PO’s meetings to present their work?</td>
</tr>
<tr>
<td>Can the PO schedule workshop sessions at their conferences for training new members of the discipline teams in MERLOT’s peer review processes?</td>
</tr>
<tr>
<td>Can the PO provide administrative support for conducting the peer review processes? Support MIGHT include:</td>
</tr>
<tr>
<td>- Assisting MERLOT co-leaders to identify and contact potential peer reviewers.</td>
</tr>
<tr>
<td>- Assisting the MERLOT discipline team to identify and select new co-leaders when a transition to new leaders is needed.</td>
</tr>
<tr>
<td>- Assisting the coordination of the timely completion and publication of reviews.</td>
</tr>
</tbody>
</table>

| Can the PO create a position in their organization for coordinating their organization’s activities with the MERLOT project? |

| Other collaborative activities |
Appendix D – Guide to Main MERLOT

In July of 2006, a new look was added to the Main MERLOT site. However, MERLOT is still able to do everything that was done before. This is a simple explanation of some of the changes which should help you become accustomed to it.

Homepage Tabs

The homepage of MERLOT has a completely different look to it, making it look more professional.

The tabs across the top are a little different, but contain some of the same information as before.

- **Communities** – The Communities tab now takes you to another page from which you can look at Community Portals from Discipline Communities, to Workforce Development Communities, to Related Communities. You can use the drop-down list to explore the Community Portals.

- **Learning Materials** – Learning Materials is the same as before. This accesses a list of ALL the Learning Materials in MERLOT, listed in order of Peer Review Value. If you want to explore a specific area, you can click on Browse Materials on the left. For instance, if you want to look at Statistics learning materials, you click on Mathematics and Statistics and then on Statistics and Probability. Again, the materials are listed with the highest quality ones first. From the Learning materials page, you can also search for learning materials and narrow your search by discipline categories; start the contribution process to add a material to MERLOT.

- **Member Directory** – Member Directory is similar to what it used to be. You can look for Members in specific disciplines. Again, these are sorted by the individuals who have the largest number of contributions appear first.

Something that is new is the icons that are next to peoples’ names. The Legend on the left side of the page indicates the ribbons that are awarded for contributions to MERLOT. The gold ribbon is given to those who have contributed 70 materials to MERLOT while the Merlot-colored ribbon is given to those who made 1 to 9 contributions. This is the beginning of the indication of participation levels which are part of the 15% solution.

In addition to the ribbons, there are other icons next to peoples’ names.

- **VSB** Means that the individual has joined the Virtual Speakers Bureau
- **Pen and Paper** indicates that the individual has authored a learning material.
- **Check in box** indicates that the individual is a Peer Reviewer.

To the right of the icons are the numbers of contributions by the individual in the following:

- **Submitted Materials**
- **Comments**
- **Assignments**
- **Personal Collections**

You can click on any of the above links to take you to those contributions by the individual. Additionally you can click on the individual's name to go to their Profile.

- **My Profile** – Clicking on the My Profile takes you directly to your MERLOT Profile which has some changes. First, on the box on the right, you can directly view the number of contributions you have made in a number of areas: submitted materials, authored materials, comments, assignments, personal collections, and virtual speakers bureau.

- **Edits** - If you want to make any changes to your basic profile, the Edit link is right above the “View MERLOT Contributions. You can change your password or upload a picture or change your title, organization, member type, etc.

  - **Other Edits** – As you move down the page, you are also encouraged to edit other areas of your profile. These are all edited separately.
    - Contact Information
    - Skills and Interests
    - Education History
    - Positions
    - Publications
    - Associations
    - Honors and Awards
    - Teaching Experience
    - Presentations

- **Authorized Users Only** – As an Editor you have access to other areas also. These are found in the Authorized Users Only box. Alternatives are:

  - **Jumpstart Your CV** – This is only relevant if you have completed the extensive Edits above. However, clicking on this link will create a Word document that has all the information on it that you entered. However, if you have not developed a resume yet, this will be helpful.

  - **Access the Partner Reserve** – This is a new method of getting to the Partner Reserve. Only authorized individuals, the MERLOT Leadership Community will have access.

  - **Make a Peer Reviewer** – This is a new way of adding Peer Reviewers (both supported and volunteer) to your discipline. You must go to their Member Profile to add them to Workspace.

- **About Us** – About Us replaces the Tasting Room. The information has been updated with the new look of MERLOT. Clicking on that Tab provides a summary of MERLOT with links to explain MERLOT. On the left are expandable topics that provide information about MERLOT.
Who We Are – This provides further information about MERLOT in the following categories.

- History of MERLOT
- Editorial Council
- Editorial Boards
- Project Directors
- Advisory Board
- MERLOT Partners
- Member Directory
- MERLOT staff

How to get involved – This provides links to

- Become a Member
- Become a Partner
- Become a Peer Reviewer
- Become a Virtual Speaker
- JOLT
- MERLOT International Conferences

MERLOT Collection – This provides links to

- MERLOT Repository
- Peer Review Process

MERLOT Awards

- Exemplary Learning Materials
- Service to MERLOT
- Application of MERLOT

Faculty Development

- Personal Collections
- 15% Solution
- Virtual Speakers Bureau
- Jumpstart your CV
- Support Materials

Partner Support

- MERLOT Partners
- Become a Partner
  - Institutional/Non-Profit
  - Corporate
  - System
  - Campus
- Grants

MERLOT Policies

- Acceptable Use
- Accessibility
- A/V Recording Policy
- Acceptable Information Use
Other Features of the Homepage

There are a number of features that are different about the homepage.

- **Visit a Discipline Community** – This is the biggest change. The Discipline Communities are listed in the middle of the homepage. Clicking on any of these will take you directly to the Community Portal.

- **News & Announcements** – This box in the lower left provides a daily update on the number of materials added and members who recently joined. When making presentations, this is valuable information to share.

- **What’s New in MERLOT** – Clicking here will show in the top box the totals for the last 30 days as well as Totals for the following activities:
  - Materials
  - Members
  - Peer Reviews
  - VSB Guest Experts
  - Comments
  - Assignments
• Personal Collections

Additionally, the most recently added materials are shown five at a time for each of the above topics.

• Exploring MERLOT – Here you can directly access the following resources in your discipline (when you are logged on):
  • Learning Materials
  • Colleagues
  • Personal Collections
  • Assignments
  • Guest Experts

• Welcome – When you are logged in, you are able to do the following activities directly from the homepage:
  • Edit your profile
  • Join the Virtual Speakers Bureau
  • Create a Personal Collection
  • Access the Content Builder
  • Enter My Workspace – More about this later
  • Access Partner Reserve – For the MERLOT Leadership Community only

• Contribute a Material – This is a new feature, as you can contribute a material directly from the Homepage. You type in the Title, the url and click on Next. You can actually test the url from the first page of the contribution. If you follow this, you will discover that you now use a wizard to contribute material. Also, if the url has already been submitted to MERLOT, you will discover that during Step 1.

• Become a Campus, System, Corporate or Institutional Partner – leads to information about the different types of partnerships.

• MERLOT International Conference – A link is provided to the conference information. Once the MIC is over, there will be links to the actual presentations of each session.

• JOLT – This leads to information about the MERLOT Journal, including:
  • Current Issue
  • Past Issues
  • Call for Papers
  • Guidelines for Authors
  • Editorial Board
  • Contact information

Material Detail
Material Detail is the information on individual learning materials. This is what is created when you submit a learning material to MERLOT. The material description is pretty much the same as before. However, one difference is that the Location just has go to material as a link to the url rather than the complete address. If you want to determine the actual url you can place your mouse over the link and the actual address will pop-up.

The major changes are found on the right side of the Material Detail. Send to a Friend – This is a handy little button that allows you to share something that you have found in MERLOT. You provide the person’s name and email address, while your name and email address appear automatically along with an automatic message that includes: Check out what I found on MERLOT today along with the title and the url. About this material – This box includes information about the Peer Review status, Comments, Assignments, and Personal Collections in which the material is found. Add your own – Rather than use tabs, from this box you can:

- **Write a comment** – There are radio buttons for the ratings and space for information such as Remarks and Technical Remarks.

- **Create an assignments** – This takes you to a wizard that has four different steps.

- **Add to a personal collection** – This is a dropdown list from which you can select one of your personal collections that you have created or you can create a new personal collection.

- **Authorized users only** – Again, as an Editor you have the ability to do some things that others are not able to do.

- **Edit material** – This takes you to the Contribute Material page and you can change anything about the material. There are five steps and you can skip ahead. For instance, if you want to add an author's email, you can click on Step 4 and make that change.

- **Manage awards** – As an Editor, you have the ability to have the Classics Award added to the module at any time. For instance, once you have selected the Classics winner, you are able to add the icon to the Material.

- **Manage snapshots** – This enables you to directly add a snapshot that you have created at the Carnegie site to the material.

Material Workspace - This link takes you to the Material Workspace which is discussed in the next section.

**Searches**

Both the Search, Advanced Search, and Federated Search work much like they did in the former interface. Browse works the same way to. When you are Browsing, the modules are sorted by Overall Rating by default. From the dropdown list, you can also sort by Title, Author, Material Type, Date Added, and Date Peer Reviewed.
Appendix E – Guide to Workspace

With the new look of the main MERLOT that was introduced in July, 2006, there were also new implementations and capabilities that were offered in Workspace.

First, it is important to understand that there are now two different “workspaces.” The first is My Workspace, which is where individuals reviewing materials - Editors, Associate Editors, and Peer Reviewers – have a place to find and store their work.

The second is Material Workspace. Each learning material that is cataloged on MERLOT has a Material Workspace. In order to Triage a module, Assign Reviewers, or send Letters, one must be in the Material Workspace of that Module. You do not do it from My Workspace.

The Editor is responsible for initially setting up the discipline. This must be done from My Workspace. Therefore, we will talk about My Workspace first.

**My Workspace**

First, to enter Workspace, you must be logged in. You can find My Workspace at the bottom of the Welcome area on the right side of the MERLOT Homepage, with the following icon: ![WS]. Click on “My Workspace” and you will go directly to your own personal Workspace.

As an Editor, you have the most capabilities of anyone on your Editorial Board. Only the MERLOT Webmaster has more capability than you. Therefore, it is essential that you determine what capabilities you want people on your Editorial Board.

**Setup Discipline**

The first thing you need to do is to set up your discipline. This only needs to be done once. You will only return to this occasionally if you decide to change some parameters.

Click on Set up Discipline

**Edit Discipline Configuration**

**Number of Triages** - This determines the number of triages that are needed to review a module. The default for this is “1”. The other alternative is 2. The review process is now set up to not permit you to review a module until it has been triaged. Therefore, until a triage has taken place, you will not be able to assign reviewers.

**Notification letter response inactivity** – This means the length of time that you will wait after a notification of intent to review a module. If you indicate 2 weeks, that means that after 2 weeks, if the author does not respond, the module will appear as “Approval to Review Item.” Please note that many of the Editorial Boards are no longer sending Notification Letters.
**Review letter response inactivity** – This means the length of time that you will wait after the review letter (after composite is completed) is marked as Approval to post. The waiting time is up to the Editorial Board to decide (one week to one month)

**Edit Composite Review Owner**

**Board Name** – The Editor should enter the name of the Editorial Board as it will be listed in the published Peer Review Report.

**Board Email** – This is the email address that is used for MERLOT communications, normally <Discipline_Name>@merlot.org

**Board Description** - This is a short description that will appear with the published Peer Review. An example of a description could be:

“The Business Editorial Board is comprised of faculty members in the areas of Accounting, Economics, International Business, Management, and Marketing. All have been selected for their expertise in teaching and have been thoroughly trained in the MERLOT Peer Review Process for educational materials.”

Edit Review Criteria – This is an opportunity for the Editor to display general information to prompt those who are completing the Individual Peer Review Report. If you use volunteer Peer Reviewers, this will help them as they’re completing the online submission of the Individual Peer Review Report.

**General Information (Step 1)** – Explain that you would like to know the subject matter, features and descriptions, uses and applications, and type of material. This should be a general descriptive summary of the module

**Learning Goals & Usage (Step 2)** – Here you should encourage the Reviewer to describe the major learning goals, the target student population, the prerequisite knowledge or skills needed, and the recommended uses of the material.

**Content Quality (Step 3)** – Here you have an opportunity to describe how you judge Quality of Content in your Editorial Board. You may mention some of the characteristics of high quality modules.

**Potential Effectiveness (Step 4)** – Again, this is the time to tell Reviewers what you mean by potential effectiveness. Mention some features of modules that have a high effectiveness level in the classroom.

**Ease of Use (Step 5)** – Tell the Reviewers what you mean by ease of use.

**Issues & Comments (Step 6)** - Encourage Reviewers to mention issues that will be important to instructors who use the module.
Edit Default Letters – There are four types of Letters that are sent automatically from Workspace. This includes a Notification Letter, Review Letter, Recognition Letter, and Reminder Letter. Workspace assumes that all of these letters will be sent from the same person, usually the Editor. Also, there are default letters for each of these which should be edited for your Editorial Board. Please note that these letters are sent through email.

Sender Name and Email – Normally, the Editor’s name and email address will appear in the sending of letters. If you have designated one of the Associate Editors to handle this responsible, then that person’s name and contact information should go there.

Notification Letter – As mentioned earlier, some Editorial Boards have opted not to send a notification of intent to review letter to the Author. If this is the case, you will need to leave both of the following blank (i.e., delete the default letter):

- Notification Subject (leave blank)
- Notification Body (delete)

- Notification Subject – This is what will appear in the Subject of the email message that is sent to the Author. A suggestion might be “Notice of Intent to Review by MERLOT”

- Notification Body – This is the message that will go in the body of the email that is sent. To assist you, a default letter has been placed here. You are encouraged to read through that letter and make any changes that you see fit. Should you decide to change it, make sure you click on the Save button at the bottom of the page to assure it will be saved.

Review Letter – This is the email letter that is automatically sent out with a copy of the Composite Review. It is essential that this letter be sent prior to posting the Review on the MERLOT site, as it is a general MERLOT policy that we seek the approval of Authors before posting the review.

- Review Subject – This is what appears in the Subject portion of the email. A suggestion is “MERLOT Peer Review.” However, you are free to use any phrase you want.

- Review Body – Again, there is a default letter provided that can be sent with the review. You are able to change this letter if you wish. However, do not leave out the portion that says the Author is able to reject it or change the review. Again, this letter will go out automatically when you elect to have it sent from the Material Workspace.

Recognition Letter – This is the email letter that is sent to Authors at their request. The letter serves to recognize them for having a good Peer Review Report. Keep in mind that this will be sent as an email to the Author. There is a default version that you are free to change this as you wish.

- Recognition Subject – This is the phrase that appears in the Subject part of the email.

- Recognition Body – There is a default letter that you may accept or change if you wish.
Reminder Letter – This email letter is sent to Reviewers to remind them that their Individual Peer Review is due or late.

- **Reminder Subject** – It is suggested that the subject mention something about the Individual Peer Review being late, so you might use “MERLOT Review Due”

- **Reminder Body** – There is a default letter that you may use or alter. Keep in mind that most of the time you are dealing with VOLUNTEER Peer Reviewers, so we always want to be polite with the reminder.

This finishes the section on Letters that you can have automatically generated. Once you save the letter(s) they will be sent out as they appear in your Workspace here. Should you wish to change something, you can go back to do it.

Don’t forget to SAVE them!

Edit Default Roles

Another important responsibility of the Editor is to edit the default roles of people working on Peer Reviews. There are two different roles that have been defined: Reviewer Roles and Associate Editor Roles. The decisions you make here will hold for all of these individuals on the Editorial Board. Therefore, you want to think carefully about what you want people to be doing.

**Reviewer Roles** – These roles are for both Peer Reviewers who are supported and for volunteers. Your selections will affect all of those individuals. You may want to discuss this with members of the Editorial Board, or you may choose to select the options that you have been using all along. Click on the box to either add or delete the capability.

- **Volunteer to Review** – This enables the Peer Reviewer to notify you that he/she would like to review the module. This is normally done during the Triage phase, when the Peer Reviewer finds something interesting. This does not commit the individual to the review. It only notifies you or the Associate Editor that they would like to review it when it does get assigned. Therefore, checking this box does not cause any “decision-making” capability to be diminished on the part of the Editor.

- **Write Individual Review** – This enables the Peer Reviewer to write the Individual Peer Review. Obviously, the purpose of having Peer Reviewers is to have them write the Individual Peer Reviews, so this should be checked.

- **Triage Material** – Selecting this box enables the Peer Reviewer to Triage any learning material on MERLOT. The name of the Peer Reviewer will obviously be attached to the triage. Some Editorial Boards may not want Peer Reviewers to complete the triages, so this box may not be checked. However, for Editorial Boards that do not have full coverage of disciplines, volunteer Peer Reviewers may be needed to Triage other areas. Therefore, you may want to select this box.

- **Write Composite Review** – This is a responsibility normally given to Associate Editors and Editors. However, in some cases Peer Reviewers may be enabled to complete the Composite Reviews. Also, if none of the supported Peer Reviewers have expertise in a subject, the Peer Reviewers may write the Composite Review.
• **Assign Self to Review** – Rather than just indicating desire to review, this actually enables the Peer Reviewer to be able to assign himself/herself to that Peer Review. If you as the Editor or Associate Editors prefer to control the review process, it is suggested that you not select this option.

• **Workspace Overview** – This is the total Overview of Workspace that you are able to see. This is the status box at the top of the page that you are able to see. It includes the Workflow Status (8 different situations) as well as the number of New ones in the last 30 days, and the Totals. You are able to click on any of these numbers to see the actual display of modules in this area, i.e. Composites completed.

  The decision to enable this option is up to the Editor. However, this may be information that you do not want to share with Peer Reviewers. Also, it may be somewhat confusing for volunteer Peer Reviewers, so you may want to disable this option.

**Associate Editor Roles** – These are roles that you want those who have been promoted to Associate Editor to have. One of the reasons for having Associate Editors is to help relieve the Editor of some responsibilities. Therefore you may want to think about what roles you can assign them.

If Associate Editors are true Associate Editors and actually run a sub-discipline like an Editor would, they should be enabled to perform some of the same responsibilities of the Editor. Keep in mind, however, that you can always go back and grant some of these roles if you change your mind.

• **Workflow Status Box** - This enables the Associate Editor to see the same box that you see at the top of My Workspace. This can be helpful to AE’s because they can go to each Status, for instance, Individual Reviews Completed, and be taken immediately to a list of those modules. Therefore it is very helpful to AE’s to have this enabled.

• **Blind Triages** – This enables the Associate Editor to see the triages without having the name listed by the Triage. This takes some control away from the AE, so the Editor must decide whether or not to enable it.

• **View All Reviews** – This gives access to Associate Editors for being able to view any of the Individual Peer Reviews that have been completed. Again, this gives some power to the AE so be certain that this is something you want them to have.

• **Edit Materials** – This gives the AE’s the ability to be able to change the Material Detail of any of the materials in your discipline. Again, this is a pretty power capability. However, many times in triaging the materials, Associate Editors may want the ability to change some information in the Material Detail. This could be misspellings, adding Author contact information, etc. Providing this capability for Associate Editors helps to make them the “curator” of the sub-discipline.

• **Edit Triages** – Enabling this selection lets Associate Editors change either the values of triages or the comments made in the triage. There may be valid reasons for making
these changes. If you empower the AE’s with this capability, make sure that it is not abused.

- **Assign Others** – This capability enables the Associate Editor to assign Peer Reviewers to a module. This would obviously be one of the reasons for having Associate Editors, so this should be checked.

- **Send Letters** – Selecting this option would allow Associate Editors to send any of the four letters above: Notification, Review, Recognition, and Reminder. You may enable the power but you may want to tell them that you only want them sending certain letters, such as the Reminder email.

- **Edit Composite Reviews** – This enables the Associate Editor to Edit the Composite Review once it has been written. Sometimes Authors may want to include their own comments on the Peer Reviewer. To enable the AE’s to do so, this option must be enabled.

- **Edit Individual Reviews** – This enables the Associate Editor to change material on any of the Individual Reviews. At first one might think that this would not be desired. However, if Peer Reviewers need help with their Individual Peer Reviews, this might be a good option for the AE’s.

- **Post Reviews** – This is the capability of posting the Expert Peer Review to the MERLOT site. This is a powerful function, so you need to think about the implications of it. Some Editors prefer to handle this function themselves.

- **Unpost Reviews** – This enables Associate Editors to remove the Expert Peer Review, perhaps for editing purposes. Again, this is a powerful option that should take careful consideration. Editors may not elect this option for AE’s and prefer to only handle this function themselves.

- **Add Reviewers** – This enables Associate Editors to add members as Peer Reviewers to MERLOT. If the AE’s are managing their own sub-disciplines, having this capability should be helpful to them. Also, if they are recruiting volunteer Peer Reviewers, this could be helpful.

- **Inactivate Reviewers** – This gives the Associate Editors the capability of removing Peer Reviewers from the Editorial Board. If supported Peer Reviewers are no longer being supported, they may not wish to continue to review. Also, some volunteer Peer Reviewers may decide not to do reviews any more. In each of these cases, the AE could remove their Workspace and remove them as choices when assigning reviews.

- **Remove from Process** – This gives the Associate Editors the ability to remove modules from the Peer Review Process. This does NOT remove them from the MERLOT site. For example, a MERLOT policy is that modules that receive a “2” in triage will not be reviewed. Enabling AE’s to do so will take them out of the process.

**At this point, you are done with Set Up Discipline.**
SAVE – don’t forget to save after making some of these changes. When you click on save, it will save and take you back to My Workspace. If you want to continue making changes to this page, you will once again have to click on Set Up Discipline.

Manage People

This page helps you to manage the individuals who are involved in the Peer Review Process: Peer Reviewers and Associate Editors. There are three major tasks that will be decided here: Add New Reviewers, Run Reviewer Report, and Edit Roles.

Add New Reviewers

This enables you to add new people to your Peer Review Team. This is helpful anytime you get new people, either supported members or volunteer Peer Reviewers.

- **Find Member** – You can type the name of the individual into the box. However, this does not add the individual. This is the same as doing a search from the Member Directory page. You may find a list of people. When you find the individual you are seeking, click on that name.

This still does not add the individual. You will be taken to the Member Profile of that person. You will want to check to make sure you have the right person. Once you are certain, look at the box, **Authorized Users Only** on the right side. You can click on **Make a Peer Reviewer** and that will automatically add the person. If you have authorized your Associate Editors to do this, they will also be able to add Peer Reviewers. You will then notice that the individual appears in the following two areas.

Run Reviewer Report

This function enables you to see how every member of your Editorial Board as well as volunteer Peer Reviewers have done.

- **Reviewer** – You are able to select each of the Peer Reviewers individually. You will notice that the Reviewers are listed with the Editors first, then Associate Editors, then Peer Reviewers. Fortunately, the list is in alphabetical order, making the individual easy to select. All you need to do is highlight the individual’s name.

- **Begin Date** – You are able to select the Begin date by month, day and year. For instance, with the Editorial Board Evaluation, the begin date would be October 1, of one year.

- **End Date** – Just like the Begin Date, you can select the specific date for the Reviewer Report. For the Editorial Board Member Evaluation, the end date would be September 30, the following year.

- **Report Format** – The Report provides data on four different measures:
Materials Triage

Reviews Assigned

Reviews Completed

Composites Completed.

The totals numbers during that time are provided as well as the listing of the actual modules and the dates completed.

You are able to select several different report formats. This may depend on the use you have for them.

- HTML – This provides the report in online format.
- PDF – This may be the most readable report and can be easily saved.
- CSV – This appears as an Excel spread sheet and has the same materials and appears with actual columns
- XSL – This appears on an Excel spread sheet and is easier to read than the CSV one.

- Run Report – You will have to click this in order to actually run the report.

Edit Roles – When you promote Peer Reviewers to Associate Editors, you can change their capabilities here.

- Reviewers – This should be the complete list of Peer Reviewers in your discipline. Please note that there is no distinction between supported Peer Reviewers and volunteer Peer Reviewers. You, however, know who those individuals are.

- Associate Editors – These are the individuals who have been promoted to Associate Editors.

Center Buttons When you wish to make changes to these members of the Peer Review Process, you do so by the buttons in the middle. You can do everything except add Peer Reviewers here.

- Top Arrow – This turns Peer Reviewers into Associate Editors. Highlight the individual’s name and then click the top arrow.

- Second Arrow – When Associate Editors decide to step down from their position, they can be returned to Peer Reviewers. Highlight the individual’s name and then click the second arrow.

- Roles – This button allows you to assign certain roles for individuals. In Set Up Discipline, you enabled certain activities for Peer Reviewers. You also enabled certain activities for Associate Editors. This button enables you to over-ride those selections on an individual basis.
For instance, if a supported Peer Reviewer is willing to assume certain responsibilities of an Associate Editor but does not want to be promoted to that position. You use this function to do that.

Highlight any individual’s name by clicking on it, and then click Roles. The page will reload and then there will appear information in the right column. It will say Roles for X X. The roles that have been assigned to that individual will appear and you can check additional boxes.

Similarly, an Associate Editor may be new, and you may not want to give that person a lot of options until they learn the job. In that case, click on the Associate Editor’s name and the same column will appear on the right, listing all the responsibilities of an Associate Editor. You can uncheck all the boxes that you want.

You can make these changes any time you want. However, don’t forget to SAVE at the end.

This is the end of the activities on the Manage People page.

Advanced Search
This search is for items in Workspace as opposed to the Advanced Search of Materials. You can use this to find materials that are in various stages of the Peer Review Process.

There are a number of different types of searches that can be conducted

- **Title** – You can search for a specific title
- **Author** – You can search for a specific author
- **Category** – The default for this is, obviously, All. Click on the arrow, and you will have the subject categories of MERLOT modules. Highlight the one you want and it appears in the box. To find a subcategory of that one, click on it. You can click on these until you reach the lowest level of category.

  You will note that the breadcrumb listing appears above at Category so you do not get lost.

- **Triage Value** – You can search for modules that have received a certain level of triage value. You can highlight the value you want:
  - **Any Triage Value** – Selecting this item will find modules that have any triage value
  - **None (0)** – Selecting this item will find modules that have not yet been triaged.
o **Remove (1)** – Selecting this item will identify modules that should be removed from MERLOT.

- **Do not review (2)** – Selecting this will identify modules that have been removed from the peer review process.

- **Low priority review (3)** – Selecting this will show modules that have been triaged as having a low priority review.

- **High priority review (4)** – Selecting this will find modules that have been triaged as having a high priority review.

- **Peer Reviewer Assigned** – This is a listing of all the individuals who participate in the Peer Review Process. By selecting an individual, you will be able to see all of the modules that they have been assigned to, either as a Reviewer or Compositor. The listing will indicate the following for that individual:
  - Material Name
  - Current status
  - Triage value
  - All Reviewers who were assigned to the module.

- **Workflow Status** – This enables you to select any stage of the Workflow status that you desire. The stages listed are:
  - **Any status** – This will access any sites that are in the Workflow status.
  - **Not ready for review** – These are items that have not yet been triaged.
  - **Ready to review** – These are items that have been triaged but have not yet been assigned to review.
  - **Under review** – These are items that have been assigned to Peer Reviewers.
  - **Individual Reviews Completed** – These are modules that have both Individual Peer Reviews completed.
  - **Composite Review Completed** – These are modules on which the Composite Review has been completed. They will be ready to have letters sent to the Author.
  - **Composite Posted** – These are modules that have the Expert Peer Review posted.
  - **Ready to Remove** – These are modules that have been triaged with a “2” and will not go through the Peer Review process.
  - **Removed from the Process** – These are modules that have already been removed from the Peer Review Process.
The value of this search tool is when you are seeking to perform certain activities. For instance, if you are ready to:

- **Triage in a Sub-discipline Category**
  - Select the Category
  - Select the Triage value of 0 (not been triaged)
  - Select the Workflow Status of (Not ready for review)

  You will have a list of learning materials in that sub-discipline category that have not yet been triaged. You can save that list and then go to each module to triage it.

- **Assign Peer Reviewers in a Sub-discipline Category**
  - Select the Category
  - Select the Triage value of 4 (high priority review)
  - Select the Workflow Status of (Ready to review)

- **Consolidate Reviews**
  - Select the Category
  - Select Individual Reviews Completed

- **Send letters to Authors on learning materials that have the Composite Review**
  - Select your major Discipline
  - Select Composite Review Completed

**Discipline Overview**

This box at the top of My Workspace gives you a quick overall view of what is going on in your discipline. Information is shown for three primary areas:

- **Workflow Status**
- **New in the last 30 days**
- **Totals**

**Workflow Status**

The following Workflow Statuses are shown:

- Not triaged
- To be assigned
- Under review
- Individual reviews completed
- Composite completed
- Posted
- Ready to remove
- Removed from process

These are fairly self-explanatory. For each of the Workflow Statuses, the numbers of modules in that particular Workflow stage:

- **New in the last 30 days**
Totals for the discipline

When one clicks on any one of the numbers in the Discipline Overview, one obtains a listing of all the modules that fall into that category. For instance, clicking on the Not Triaged number will provide a list of all the modules in your discipline that have not been triaged. The list provided includes:

- Material - Name of the Learning Material
- Author Name - Author
- Date Created – Date the module was added to MERLOT
- Add Triage – Clicking this enables you to go directly to the Add Triage value for that module. Be careful with this option.

If you click on the Material, you will go to the Material Detail. Then you can click on Location, the actual url, and look at the module. Then you can go back to Material Workspace to Triage the item.

My Reviews

This section appears as My Workspace for anyone who is involved in the Peer Review Process. There are three types of records that are shown here.

My Recently Assigned Reviews – When the Editor or Associate Editor assigns a Reviewer to a Review, it automatically appears here. Peer Reviewers may be assigned to several different reviews at one time. Until the reviewer begins working on the Review in Workspace, the learning materials will remain listed here. The number of modules appears in the gold band at the top of the box.

There are several items listed with the Review. These include:

- Material – This is the name of the learning material, as listed in MERLOT. Clicking on the name will take you to the detail view.

- Type – This indicates that you have been assigned to either an Individual or Composite Review.

- Date Assigned – This shows the date that the module was assigned to the Reviewer. This is designated by the Editor or Associate Editor.

- Date Due – The person assigning the Review will also designate a date that the Individual or Composite Review is due to be completed.

Note also that each of the above titles can be clicked on to sort the items. One might consider sorting it by the Date Due, or by the Type. After the sort, an arrow appears next to the item that it currently is sorted on.

My reviews in progress

This box is similar to the one above. Once Peer Reviewers have begun a Peer Review (either Individual or Composite), they have the option to save what they have done so that they may come back to complete it. This box has those items listed, with an additional item:
My completed reviews
This is a listing of all the modules that the Reviewer has completed. The list can be sorted in a variety of ways:

- Material – alphabetical order
- Type – whether it is an Individual or Composite Review
- Date assigned
- Date due
- Last saved

At the bottom right of this box, you can click on “Show All”. This will provide a complete list of all the Peer Reviews that you have completed.

My Triages
This is a listing of all the Materials that the individual has ever triaged. These can be sorted on:

- Material
- Triage Value
- Date Triaged

The icons at the end of each Material serve the following functions:

- By clicking on the Eye, a pop-up box appears that shows the Triage, including the Comment made.
- Clicking on the pencil enables you to go back and edit the Triage, by either changing the value or changing the comment.
- Clicking on the X deletes the triage.

Letters
This area will probably only be used by Editors. Once the Editor sends letters of any type, they will be recorded here. There are areas for Notification Letters, Review Letters, and Recognition Letters. This area tracks the Material, Creator, Who it was Sent to, Date Sent, and Current Response.

Material Workspace
Material Workspace is the area associated with any learning material that has been added to MERLOT. When one contributes a learning material to MERLOT, a Material Detail is created for that module. Material Workspace can only be accessed by someone who is assigned to do the Peer Review of the learning material or an Associate Editor or Editor.

Material Workspace is accessed from the Material Detail of the module. There is a box on the lower left that says Authorized Users Only. The bottom of the box should have an entry that
says Material Workspace. Click on that link and you will go to that learning material's Workspace.

**My Workspace**  
First you will notice that there is a link directly back to My Workspace from the Material Workspace. That is because you find out that you have an activity assigned to you from My Workspace. If you are reviewing you may be going back and forth between the two pages.

**Status Box**  
The Status Box provides the status of this learning material in Workflow.  
- This arrow indicates the next step that has to be done on the learning material, or basically tells you what you need to do, i.e. Complete the Composite Review, Send a Review Letter, Post the Composite Review.  
- This check-mark indicates that the step has been completed.  
- As each module moves through Workflow, the Status Box is updated at the top, from Status: (none) to Status: Composite Posted.

The Status Box makes it very easy to track the progress of the learning material through the workflow and the Peer Review Process.

**Triage**  
The Triage Box is where a Peer Reviewer can enter the triage value for the learning material. Click on “Add Triage” and a box will pop up in which you:  
- Enter the Triage value from the drop down list (1 to 4)  
- Enter a comment about why you gave it that triage value  
- Can indicate whether or not you would be interested in reviewing the material.  
- Save the Triage

When you hit Save, the triaged will be saved and will show in that box:  
- Who triaged it  
- Value of the triage  
- Date of the Triage

Please note, that you will NOT be able to assign Reviewers to a learning Material until it has been triaged. When it has been triaged, links will show up in the other two boxes.

**Reviews**  
This box keeps track of the reviews that have been assigned to a learning material. You will not have any links show up in this box until you have triaged the item.

- **Assign a Reviewer** – A pop-up box will appear that enables you to assign reviewers.  
  - **Type of Review** – First, indicate whether the Reviewer is being assigned to do an Individual Review or a Composite Review by clicking the circle. The default is Individual Review.  
  - **Find a Reviewer** – Here you will find an alphabetical list of Peer Reviewers. Anyone who volunteered to review the module will appear at the top of the list. You many select that individual or not. If you wish to assign the module to
someone whose name is not on the list, you will have to go to their Member profile to add them. You select the individual by clicking on the name. Only one Reviewer is assigned at a time.

- **Date Due** – The default is no due date. You may select the date that you would like the review to be due by indicating so on the drop down lists.
- **Notification email** – By clicking on the box, an automatic email will be sent to the individual with the Title of the Material as well as the url for the Material Detail. The email will be from the MERLOT Administration Team.
- **Save** – Make sure you save the information.

Repeat the above step to assign another Reviewer and also someone to the Composite Review. Please note that you will not be able to complete the composite review until someone is assigned to it.

The Review box now indicates the reviewers who have been assigned, the type of review, the date the review was assigned, the date it was due, and the current status. There will also be a “Remind” link that will send a reminder email automatically when you click on it.

Through the options, you have the ability to:

- Edit the Review
- Delete the Review

Once the Composite Review is completed, you will have the ability to post the Composite as the final Peer Review Report that appears on MERLOT.

### Letters

The Letters box keeps track of the letters that have been sent on behalf of the module. The box is updated depending on which stage the learning material is in. These letters will be sent out according to how you have set them up in Set Up discipline.

- **Send Notification Letter** – Once the material has been triaged, you are able to send a Notification email letter to the Author. This is optional. The letter box will indicate Send Notification Letter.
- **Send Review Letter** – As soon as the Composite Review is completed, this capability will be highlighted in the Letter box and you will be able to send the Review Letter that asks permission to post. If there is no Author identified, you will not be able to send this letter.
- **Send a Recognition Letter** - Once the Peer Review Report is published, if the Author has indicated that he/she wants to have a Recognition Letter sent you may do so here. Note, however, that sometimes a letter prepared in Word format with formal stationary might be more appropriate.

Material Workspace stays with the Learning Material as long as it is on MERLOT. That is, after the Peer Review Report is published, the Learning Material is still linked to this Workspace. The Editor can go back to see who reviewed the material and whether any letters were sent.
Appendix F - MERLOTSpeak

MERLOT uses a lot of terms that we take for granted other people understand. This is an attempt to define some of these terms for you when you hear them. Additionally, you may be asked questions about some of these as you work on the MERLOT Leadership Team.

**15% Solution** - MERLOT tracks member participation in the services offered on this website and automatically presents contributors with awards commensurate with their participation. A goal of MERLOT is to increase the number of faculty who successfully use of academic technology in higher education. Our target is to achieve a “15% solution” where 150,000 faculty of the 1 million faculty members in North America are certified as having demonstrated skills in academic technology within 5 years.

**Academic Partner** – This term describes the “Higher Education” Partners of MERLOT that include both Campus Partners and System Partners.

**Acceptable Use** - The Acceptable Use Policy (AUP) is intended to aid any and all MERLOT users (registered or not) in understanding how the contents found in MERLOT may be used. All users of MERLOT must comply with this AUP, the purpose of which is to help protect MERLOT participants and members of the MERLOT community from illegal or irresponsible activities.

**Accessibility** - MERLOT is in the process of being compliant with ADA priority one standards as mandated by TITLE IV, SECTION 508, of REHABILITATION ACT AMENDMENTS OF 1998. MERLOT is undergoing testing for compliance with JAWS v 3.7, Bobby v 3.2, Web Accessibility Evaluation Tool created by CSU Fresno and a validator provided by the W3 consortium. MERLOT is not responsible for the ADA compliance of sites whose links are listed in MERLOT.

**Administrative Team** – The MERLOT Administrative Teams consists of all the people who work either full-time or part-time on the MERLOT project but are not affiliated with any types of partners.

**Affiliates** – This is a level of partnership that involves a joint advocacy and a modest level of cooperation. The details of this relationship will be described in a MOU that outlines the types of cooperation. An Affiliate may be a System/Partner, Non-Profit Institution, or Corporation.

**Assignments** - These are projects, papers, or activities that can be part of the coursework for a class. Assignments are linked to a learning module in MERLOT and may involve only that learning object or may involve other activities as well. In writing the Assignment, the contributor describes the type of activity (i.e. in-class, homework assignment, individual assignment, group, etc) as well as the time involved. The contributor also can identify objectives for the assignment as well as any assessment activities.

**Associate Editor** – An Associate Editor is an Editorial Board Member who has been promoted from Peer Reviewer. The promotion is a decision between the Editor, the Board Member and the Project Director. Associate Editors assume different responsibilities than Peer Reviewers, but receive the same level of support from their PDs. Normally an Associate Editor will act as
an Editor for a sub-category in the Discipline; that is they will recruit Peer Reviewers, assign modules for review, and consolidate reviews.

**ATHE** – This is the Association for Theatre in Higher Education which is a non-profit Affiliate of MERLOT. The organization currently has a Taskforce that has created a Taxonomy for Theatre and is currently building the collection of materials.

**Browse** – This is a feature of MERLOT in which you can view materials of MERLOT. When you Browse materials, you are merely looking through the collection. Typically you would Browse by going to the top level category and then working your way down to the sub-category in which you are interested. When that list is displayed, the Learning Materials are listed in order of quality; that is, the ones which have the highest rating on Peer Review are listed first.

**Campus Partner** – This is an individual higher education institution that has entered a partner relationship with MERLOT. That partnership involves an annual participation fee as well as support for Editorial Board Members and a Project Director who participates in the MERLOT Initiatives.

**Catalog** – This refers to the learning materials that appear on MERLOT. This can also be used as a verb, thus one “catalogs” the material contributed to MERLOT using certain types of metadata.

**CDL** – This is the Center for Distributed Learning of California State University. The CDL developed and provided free access to MERLOT since its conception. The Center continues to work with MERLOT to provide support services.

**Classics Award** - The MERLOT Awards Program for Exemplary Online Learning Resources recognizes and promotes outstanding online resources designed to enhance teaching and learning. Each MERLOT Editorial Board honors the authors and developers of these resources for their contributions to the academic community by conferring the MERLOT Classics Award annually.

**Collection** – The term Collection refers to all of the learning materials that are catalogued in MERLOT as well as the Assignments and Member Comments that are associated with those learning materials.

**Community** - Community is at the core of MERLOT. The collaboration within and across the discipline communities that make up MERLOT has been the essential ingredient that has helped MERLOT meet the needs of the faculty and other MERLOT users. MERLOT is designed to support communities of faculty and instructors working together to identify and use (as well as develop) good

**Community Portal** – This is a “Homepage” within the Homepage of MERLOT. From the MERLOT Homepage, you can enter a Discipline Community Portal which is developed and maintained by the Editorial Board. These Portals offer teaching tips in the discipline, links to resources that will help in teaching, information about the Editorial Board and a lot more.
COMPASS – This stands for Community of MERLOT Partners Academic Support Services. There is a logo that indicates Learning Materials that are found in this category. Materials in this category are used across disciplines.

Content Builder – This is the content creation tool that MERLOT received from the Carnegie Foundation. Materials created with Content Builder are actually hosted on the MERLOT website.

Corporate Partner – Corporate partners are for-profit companies that have entered into a partnership with MERLOT and are actively engaged with MERLOT to deliver a product and/or service. They include technology companies, academic technology companies, and content publishing companies that are actively engaged with MERLOT to deliver a product and/or services.

Corporate Sponsors – are for-profit firms that pay for a presence on or within MERLOT’s programs, services and/or website to build goodwill and brand recognition.

Creative Commons - Creative Commons provides control to creators of online materials regarding the use of their work by others. There are two basic categories of IP in the MERLOT collection (Table 1); A) IP that concerns MERLOT services and functions, found directly in the MERLOT website, and B) IP created independent of MERLOT, but available through the MERLOT website. MERLOT will be implementing a creative Commons policy for materials.

CUDA – This is the Center for Usability in Design and Assessment which supports the development and implementation of academic technology within the Cal State University system and in other educational institutions, government agencies, and private industry. CUDA often does usability testing and design for MERLOT.

Digital Divide – This is a MERLOT project with a humanitarian mission to improve higher education in developing countries by provide access to materials and curriculum for training people in those countries to use digital resources in teaching and learning.

Digital Library – A Digital Library is a library in which a significant proportion of the resources are available in machine-readable format accessible by means of computers. The digital content may be locally held or accessed remotely via computer networks.

Digital Marketplace - The Digital Marketplace is a California State University initiative whose goal is to enable the effective distribution of network-based digital goods and resources in support of CSU academic programs. It is based on the growing need to effectively acquire, share, market, and distribute commercial and non-commercial digital learning content and resources within the institutional environment; and to integrate the content within instructional programs.

Discipline Community – A Discipline Community consists of Members of MERLOT who help grow the MERLOT collection within a discipline by contributing materials as well as introducing others to MERLOT. MERLOT Discipline Communities are led by Editorial Boards. New
Communities are added when a 'critical mass' of resources in a particular discipline or area have been identified and when people willing to focus on developing the Community associated with that area have agreed to participate.

**Distinguished Service Award** - The *Distinguished Service Award* is reserved as MERLOT’s highest honor. The recipient of this award exemplifies the vision that brings MERLOT members together to create the MERLOT Community. Individuals who receive this award have made many personal contributions to MERLOT and have demonstrated their dedication to MERLOT through serving as visionaries and leaders. The recipients are selected by the previous winners with consultation from MERLOT management.

**Editor** – An Editor is the leader of a Discipline Editorial Board. Editors are appointed and supported by Project Directors representing Higher Education Partners as well as Institutional and Corporate Partners. An Editorial Board may have one or two Editors, sometimes called Co-Editors.

**Editorial Board** – Editorial Boards are one of the cornerstones of MERLOT. They lead the development of MERLOT's discipline communities - one Editorial Board for each community - and are comprised of Editors, Associate Editors and Peer Reviewers. They are also responsible for the discipline Peer Review Process.

**Editorial Board Member** – An Editorial Board Member is anyone who is on the Editorial Board and includes Editors, Associate Editors and Peer Reviewers.

**Editors Choice Award** – The Editors’ Choice Award is an annual award for exemplary online materials. The Editors’ Council reviews the Classics Awards each year and votes on the outstanding learning material(s) from all of them to receive the Editors’ Choice Award.

**Editors Council** – The Editors Council is one of the primary leadership groups of the MERLOT Community. It is comprised of Editors of the Editorial Boards. The Editors’ Council meets face-to-face twice annually and also meets through teleconferences every month. The Editors’ Council has several functions including determining policies related to Editorial Boards, management of discipline Editorial Board activities, setting the direction for the Peer Review process, selecting the Editors’ Choice Award winners, and representing MERLOT within their disciplines.

**EDUCAUSE** - EDUCAUSE is a nonprofit association whose mission is to advance higher education by promoting the intelligent use of information technology. The EDUCAUSE Learning Initiative (ELI) is an Institutional Affiliate of MERLOT

**ELXR** – This is a MERLOT Innovation Project to develop new ways for faculty development centers from a wide range of higher education institutions and online discipline repositories (e.g. MERLOT) to collaborate on engaging faculty with exemplary teaching practices. Discipline repositories can provide the discipline-based examples and the shared resources for faculty to re-use and adapt to implement exemplary teaching practices. The discipline-based examples under development will be video narratives of faculty and students demonstrating and reflecting on their teaching and learning, capturing the rich, multidimensional nature of education.
Faculty Development – Faculty Development staff typically teach classes about teaching and learning. Faculty development specialists provide consultation on teaching, including class organization, evaluation of students, in-class presentation skills, questioning and all aspects of design and presentation. They also advise faculty on other aspects of teacher/student interaction, such as advising, tutoring, discipline policies and administration. Thus a Faculty Development person would teach faculty members how to use MERLOT in their courses.

Federated Search - This search engine allows you to search for learning materials from multiple partner collections, instead of having to search each one separately. You benefit by performing one search and getting integrated results at once. The results are combined together into one list and sorted by relevance, title, or originating collection. Currently each collection returns 10 results at a time from each service as a default. Users have the option to receive from 5-25 results per collection. Federated Search hides the complexity of the system by presenting one search tool to the user to perform the search. In MERLOT you do the Federated Search by clicking on “Search More Digital Libraries” at the top level or within a Discipline Community.

GLOBE - The Global Learning Objects Brokered Exchange (GLOBE) alliance has been established between the following founding members: the ARIADNE Foundation in Europe, Education Network Australia (EdNA Online) in Australia, eduSourceCanada in Canada, LORNET in Canada, Multimedia Educational Resources for Learning and Online Teaching (MERLOT) in the US, and National Institute of Multimedia Education (NIME) in Japan. These organizations have committed to work collaboratively on a shared vision of ubiquitous access to quality educational content. The consortium will provide a distributed network of learning objects that meet quality standards.

Grapevine – The Grapevine is a quarterly MERLOT Newsletter (October, January, April, and July) that is sent to all members of MERLOT. The purpose of the newsletter is to update all members of various MERLOT projects and initiatives.

Higher Education Partners – This consists of both Campus Partners (individual college or university) and System Partners (multi-campus systems). Representatives of these institutions participate in MERLOT leadership activities and collaborate on MERLOT initiatives.

In the Vineyard – This quarterly publication is sent to the MERLOT Leadership Community on a quarterly basis. The purpose of the newsletter is to advise the Leadership Community of what is new in MERLOT as well as to celebrate the successes of members of the Leadership Community. This publication is sent one month prior to the Grapevine (September, December, March and June) and contains some of the same information.

Institutional Initiatives - An Institutional Initiative is a program or project that our academic partners may be focusing on as part of their strategies. Each institutional initiative requires a plan for the types of MERLOT resources and services that MERLOT partners can leverage to advance their initiative’s success.

Institutional Partner – Institutional Partners are academic non-profit organizations such as disciplinary professional societies and digital libraries. Institutional Partners can be Project Partners who provide some type of in-kind support for a project or Community Partners which provide support for leadership and initiatives.
**Intellectual Property** - In law, intellectual property (IP) is an umbrella term for various legal entitlements which attach to certain types of information, ideas, or other intangibles in their expressed form. The term intellectual property reflects the idea that this subject matter is the product of the mind or the intellect, and that IP rights may be protected at law in the same way as any other form of property. MERLOT has an Intellectual Property Policy which governs how MERLOT assets can be used. Individual learning resources listed in MERLOT are governed by their own IP policies.

**JOLT** – The MERLOT Journal of Online Learning and Teaching (JOLT) is a peer-reviewed, online publication addressing the scholarly use of multimedia resources in education. JOLT is published quarterly in March, June, September, and December. There is a direct link to JOLT found on the Homepage of MERLOT.

**Learning Materials** – This refers to any of the materials in the MERLOT collection, including simulations, animations, tutorials, drill and practice exercises, quizzes or tests, lectures or presentations, case studies, collections, reference materials, and podcasts.

**Learning Object** – A Learning object is anything that helps students accomplish a Learning Objective in a course. A Learning Object can take many forms: a chapter of a textbook, a PowerPoint presentation, an online simulation, a guest expert delivering a presentation over the internet. These resources are made accessible online by teachers so that they can be exchanged, re-used and adapted to meet the needs of students and the objectives of others’ curriculum.

**LMS** – Learning Management Systems (LMS’s) provide institutions with a reliable infrastructure for the presentation of online materials. In order to demonstrate their value to their customers, each company strives to provide outstanding reference examples of the utility of their system over their competition. To accomplish this, each company seeks to form strategic alliances with partners who can provide content that can demonstrate the superiority of their system’s instructional design and presentation functions. Information about relationships with LMS can be found in About Us.

**MAN** – MAN is an acronym for MERLOT African Network. This is an outreach effort by MERLOT to bring our learning materials to a number of African nations and organizations.

**Marketing Materials** – Marketing Materials are flyers and brochures we use to help spread the word about MERLOT. At this date we have 3 major publications: Overview of MERLOT, Peer Review, and Learning Objects, plus Discipline Flyers for each of the 15 Editorial Boards.

**Material Workspace** – This workspace is only available (authorized) to those who perform Peer Reviews. The Material Workspace provides a record for each of the individual modules in MERLOT and tracks its progress through Workflow, including Triages, Reviews (Individual and Composite), and Letters sent.

**Member Comments** – Member Comments are comments regarding any of the learning materials. Commenters are requested to rate the module, tell how it was used, and remarks about the module. The purpose is to provide other potential users with an idea of the usefulness of the learning material.
MERLOT Community – The MERLOT Community consists of members of MERLOT who actively participate in using MERLOT resources, contributing resources and interacting with others, all in the online environment.

MERLOT Leadership Community – The MERLOT Leadership Community consist of Project Directors, Editors, Editorial Board Members, and the MERLOT Administrative Staff.

MERLOT Member – A MERLOT Member is anyone who signs up for free membership and provides their name, email address and affiliation. Only MERLOT Members can make contributions to MERLOT.

MERLOT User – A MERLOT User is anyone who is a MERLOT Member or anyone who goes to the MERLOT site without logging in. Users are free to use the learning materials on MERLOT but are not able to make contributions unless they join MERLOT.

MIC – This is the MERLOT International Conference which is held annually and is open to all. The conference enables the MERLOT Leadership Community to meet together and is also designed to foster learning, innovation and practice in the use of information and communications technologies in higher education. It is the venue for educators, administrators, and technologists who have interests and expertise in technology-enabled teaching and learning and who recognize the need to remain current in this rapidly advancing field of educational practice and theory. In 2010 we began combining our conference with Sloan-C for the Emerging Technologies Conference.

Module – In the MERLOT sense, a module is any instance of Learning Material. The term “Module” may confuse some faculty members as module is sometimes used to refer to a self contained component of a course.

My Profile – All Members of MERLOT have a personal profile which they can add information to. You can upload a photograph, and provide information about skills and interests, education history, positions, publications, associations, honors and awards, teaching experience and presentations. This is also the place where Members can access their Personal Collections.

My Workspace – This is the private MERLOT area in which participants in the Peer Review Process do their work and access the work of others (restricted to Editors and Associate Editors). All participants in the peer review process has their own personal Workspace and can find materials they need to work on or have worked on in the past.

Partner – A Partner is a Higher Ed Organization, Institution or Non-Profit Organization or Corporation that pays a partner fee, collaborates on MERLOT Initiatives, and participates in MERLOT leadership.

Partner Reserve – Partner Reserve is a private section of MERLOT which is accessible to Partners only. The Partner Reserve provides access to MERLOT marketing materials, training programs, faculty development programs, and many other types of materials targeted to partners only.

Peer Review - Peer review (known as refereeing in some academic fields) is a process of subjecting an author's scholarly work or ideas to the scrutiny of others who are experts in the
field. MERLOT Peer Reviews are designed to help faculty determine the quality of the learning materials in the MERLOT collection and their relevance and applicability to the courses they teach. Conducting these Peer Reviews is a critical, strategic initiative for MERLOT.

**Peer Review Process.** The Peer Review Process used by MERLOT follows the model of the peer review of scholarship. The first stage of the process is Triage, in which a member of the Editorial Board determines if the material is worthy of review. Then two Peer Reviewers are assigned to conduct independent Peer Reviews. An Associate Editor then consolidates the two reviews and this consolidated review is sent to the Author of the learning material. Upon approval of the Author, the final Peer Review Report is posted to the MERLOT site. MERLOT conducts Peer Reviewer Training for new Editorial Board Members. These new Board Members are also mentored by current Editorial Board Members until the Editor is satisfied that they are conducting high quality Peer Reviews.

**Peer Review Report** – The Peer Review Report is the final peer review that is shown on the public MERLOT site, linked to a learning material. It has gone through the complete Peer Review Process.

**Peer Reviewer** – Peer Reviewers can be either supported (nominated by a Project Director and receiving some sort of support for being on the Editorial Board) or volunteer (receive no support, but conduct Peer Reviews as a service to the discipline.

**Personal Collection** - Personal Collections help personalize the MERLOT collection for members. It is a compilation of MERLOT modules that MERLOT Members can access easily to use for specific purposes, classes or topics. The owner of the Personal Collection can annotate each collection to more easily explain the purpose of it. These Personal Collections are also available to the general public and can assist other MERLOT Members in finding good learning materials.

**POD** – This is the Professional and Organizational Development Network in Higher Education, which develops and supports practitioners and leaders in higher education dedicated to enhancing learning and teaching. It is the organization to which many faculty development staff belong.

**Project Director** – Project Directors are appointed to represent their System Partners and are responsible for recruiting Editorial Board Members. Project Directors have critical responsibilities in managing their institution’s participation in MERLOT and MERLOT’s connection to their institution’s academic technology initiatives. Responsibilities of Project Directors include participation in MERLOT’s governance activities, selection of Editors and Editorial Board members, supervision of Editorial Board members, and management of their institutions’ partnership with MERLOT.

**Project Directors Council** - The Project Directors’ Council is comprised of all of the Project Directors (System Partners) and Campus Liaisons (Individual Campus Partners).
Related Community – A Related Community is a collection of Members that share a common interest in support of online learning that typically cuts across many disciplines. An example is GLOBE or MERLOT – EPAC.

RSS Feed – RSS stands for Really Simple Syndication. RSS feed allows current MERLOT content to be displayed on anyone’s web site. With RSS the content updates automatically, showing any additions to the MERLOT materials collection.

Search – Search is a function in MERLOT that enables the User to find specific Materials by keywords or exact phrases. Search is available in both the Main MERLOT and the About Us section. Advanced Search enables the User to search by a number of metadata regarding the material attributes, author, community contributions, etc.

SERC – This is the Science Education Resource Center at Carleton College which has developed “Teach the Earth,” a portal for Geo-science Faculty. MERLOT is working collaboratively with SERC to develop pedagogical resources such as ready-to-use activities, help for using new teaching methods, ideas for designing courses, professional development workshops and thematic websites addressing high interest topics (using data in your courses, teaching quantitative skills, research on learning).

Snapshots – Also called From the Author Snapshots, this is a reflection by Authors on their pedagogy as well as guidance for other instructors on how they might use the materials themselves. Snapshots was developed through an alliance with the Carnegie Foundation for the Advancement of Teaching and is created through their KEEP Toolkit.

Sponsors – Sponsors pay for a presence on or within MERLOT’s programs, services, and/or website to build goodwill and brand recognition. Sponsors normally are for-profit organizations. Collaborating as a MERLOT Sponsor enables them to educate leaders of higher education about the tools, services, and resources that are sold by commercial companies in ways that are acceptable to the higher education community. They also hope to learn from leaders of higher education about the tools, services, and resources that they need to achieve their professional and institutional goals.

Supported Editorial Board Members – These are individuals who are appointed by their Project Director or Campus Liaison to participate on the Editorial Boards. They receive some form of support (release time, course buy-out, stipend) to participate as well as travel expenses to participate in required MERLOT meetings. They can be Editors, Associate Editors and Peer Reviewers.

Sustaining Partners – A Sustaining Partner is any type of partner (Higher Education, Non-Profit Institution, or Corporation) that supports MERLOT at a higher level of participation and pays higher partner fees.

System Partner – A System Partner is a Higher Ed Partner that represents a multi-campus organization.

Taskforce – A Taskforce is an “Editorial Board in Training.” It is a community that hopes to become an Editorial Board. Their responsibilities are to establish a Taxonomy for the discipline and then to contribute Learning Materials, Member Comments, and Assignments. Once a critical mass of resources is reached and when a committed group of people are focused on
developing that community, the Project Directors determine if the Taskforce is ready to become an Editorial Board.

**Tasting Room** – The Tasting Room is the former name of what has now become “About Us.”

**Teaching Commons** – The Teaching Commons is a service to enable MERLOT Partners to easily, effectively, and inexpensively customize and sustain the infusion of MERLOT services into their institution. MERLOT’s Institutional Teaching Commons services is a partner-only benefit and will enable the MERLOT Project Directors to bring greater value back to their own institutions and become more successful stewards of MERLOT services.

**Triage** – Triage is the first step of the Peer Review Process. Peer Reviewers do a cursory review of learning materials that are submitted to MERLOT to determine if they are appropriate for peer review. The Peer Reviewer determines whether the module has a High Priority, Low Priority or is Not Appropriate for Review. Editorial Boards begin the second stage of the review of the learning materials that receive High Priority.

**Virtual Speakers Bureau** - The VSB is a service of MERLOT through that can help individuals find fellow MERLOT members who are willing and able to share their content expertise with students as Guest Experts. Members of MERLOT can become members of the VSB by submitting information on their Member Profile.

**Volunteer** – A Volunteer is somebody who receives no support for the work they do on MERLOT. Volunteers are typically volunteer Peer Reviewers, but some have been volunteer Associate Editors.

**Volunteer of the Year Award** - The Volunteer of the Year Award honors the hard work and generous donation of our members’ time, energy and enthusiasm that they direct towards the growth and development of MERLOT. These individuals do not receive any support from our partners for completing these responsibilities. MERLOT relies on our Peer Reviewers to help expand the MERLOT collection and perform the Peer Review process. These individuals are nominated by the Editorial Boards and then selected by our Project Directors Council.

**Webmaster** – The Webmaster is the main contact for the MERLOT Community on issues related to the MERLOT website, including assistance, problems, etc. One can contact the Webmaster at: [webmaster@merlot.org](mailto:webmaster@merlot.org)

**Workforce Development** – This initiative began when the MERLOT Leadership Community recognized that there is a significant and growing need for many institutions of higher education to develop and deliver high quality interdisciplinary programs that serve regional and national workforce development demands. Workforce development programs that cover such areas as computer operations and electronics, trades, allied health, protective services, automotive, and hospitality are increasingly important for community colleges and extended education programs to fulfill their missions and receive state funding. The first Workforce Development Community was Fire Safety.