Merit Policy

Part II: Academic Unit Criteria, Standards, and Processes

Academic Unit: School of Physical Therapy

Merit/Fixed Market raises refer to the component of salary raises that are provided to Bargaining Unit Faculty Members (hereafter, BUFM) who meet or exceed their assigned unit performance expectations. In any given year, it is possible that all of the faculty members in an academic unit may be eligible for merit salary raises.

Merit/Fixed Market eligibility will be based on meeting or exceeding unit performance expectations for merit in the following areas: Teaching Effectiveness, Scholarly/Creative Activity, and Service. Each BUFM will receive merit scores for the appropriate performance areas as well as an overall merit score which will identify whether the BUFM's performance was unacceptable, did not meet expectations for merit, met expectations for merit, or exceeded expectations for merit.

Merit Criteria, Performance Indicators and Expectations:

Overview

Merit will be based on meeting or exceeding unit performance expectations that are assigned to the BUFM on the following performance criteria: Teaching Effectiveness, Scholarly/Creative Activity, and Service. Each of the aforementioned criteria (e.g., teaching) will be evaluated using a number of performance indicators (refer to Performance Indicator Chart). Merit committee members will review information submitted by each BUFM to assign a numerical score for each criteria using a rating scale anchored with examples of expected levels (or their equivalent) of performance on the performance indicators. Merit committee members will average the score using the summary form provided.   Scores must clearly identify whether the assigned score reflects performance that is unacceptable, fails to meet expectations, meets expectations, or exceeds expectations for merit.

The levels on each of the performance indicators should capture how the unit defines exceeding expectations, meeting expectations, failing to meet expectations, and unacceptable for performance:

Exceeds expectations for merit: Activities in area cumulatively exceed expectations and reflect a clear and significant level of accomplishment beyond what is normal for an individual with a given faculty rank in the school.

Meets expectations for merit: Activities in area cumulatively meet expectations and reflect standard levels of performance for the school.

Fails to meet expectations for merit: Activities in area cumulatively do not meet expectations and fall below the standard levels of performance for the school.

Unacceptable: Activities in area cumulatively are unacceptable and fall well below the standards of performance for the school.

The merit committee will then assign an overall merit rating. The overall merit may include any number of values or rating levels, but it must clearly identify whether the overall merit rating reflects performance that is unacceptable, fails to meet expectations, meets expectations, or exceeds expectations for merit.

Performance Indicator Chart

Evaluation Rating Category	TEACHING Expected levels of accomplishment on teaching performance indicators (or their equivalent)	Possible Merit Score for Teaching

Exceeds expectations for merit	#1 and #2 are required to exceed expectations for merit in teaching.
	
	1. Results of University Wide Student Evaluations from all courses taught during the review period have a combined average of 4.0 or greater on the 5.0 scale.
	2. Three or more of the following:
	  a. Peer teaching evaluations that indicate outstanding performance such that the average score is 4.0 or greater on a scale of 5.0 used in the SoPT peer evaluation policy
	  b. Summary of qualitative comments from the University Wide Student Evaluations (Greater than 50% positive comments)
	  c. Evidence of development of new courses, course revisions, or program revisions
	  d. Evidence of professional development activities for enhancing teaching
	  e. Evidence of teaching awards and distinctions
	  f. Evidence of published or unpublished pedagogical materials
		4.0-5.0

Meets expectations for merit	#1 and #2 are required to meet expectations for merit in teaching.
	
	1. Results of University Wide Student Evaluations from all courses taught during the review period have a combined average of 3.0 or greater on the 5.0 scale.
	2. Two or more of the following:
	  a. Peer teaching evaluations that indicate outstanding performance such that the average score is 3.0 or greater on a scale of 5.0 used in the SoPT peer evaluation policy
	  b. Summary of qualitative comments from the University Wide Student Evaluations Greater than 50% positive comments))
	  c. Evidence of development of new courses, course revisions, or program revisions
	  d. Evidence of professional development activities for enhancing teaching
	  e. Evidence of teaching awards and distinctions
	  f. Evidence of published or unpublished pedagogical materials
		2.0-3.9

Fails to meet expectations for merit	Evidence of merely meeting #1 and #2 is consistent with failing to meet expectations for merit in teaching.
	
	1. Results of University Wide Student Evaluations from all courses taught during the review period have a combined average of 3.0 or greater on the 5.0 scale.
	2. One or few of the following:
	    a. Peer teaching evaluations that indicate outstanding performance such that the average score is 3.0 or greater on a scale of 5.0 used in the SoPT peer evaluation policy
	    b. Summary of positive qualitative comments from the University Wide Student Evaluations
	    c. Evidence of development of new courses, course revisions, or program revisions
	    d. Evidence of professional development activities for enhancing teaching
	    e. Evidence of teaching awards and distinctions
	    f. Evidence of published or unpublished pedagogical materials
		1.0-1.9

Unacceptable	Evidence indicates teaching performance that frequently falls below the schools basic standard (evaluations <3.0, poor qualitative student comments, <3.0 on peer evaluations, lack of pedagogical development, lack of professional teaching development, lack of course development/revision OR No materials submitted.	0-0.9

Merit Score for Teaching (to be completed by merit committee member): _____

Evaluation Rating Category	SCHOLARLY/CREATIVE ACTIVITY Expected levels of accomplishment on Scholarly/Creative Activity performance indicators (or their equivalent)	Possible Merit Score for Scholarly Activity

Exceeds expectations for merit	At least three of the following:
	  a. Evidence of peer-reviewed manuscript or book chapter in press or published
	  b. Evidence of funded external grant
	  c. Evidence of editorship of a journal, book, or set of conference proceedings
	  d. Evidence of peer-reviewed or refereed Conference Education Session at a state, national or international professional conference
	  e. Evidence of significant contribution (at least 40 items) to the National Physical Therapy Licensure Examination (NPTE), or a significant contribution (at least 20 items) to one of the American Board of Physical Therapy Specialties (ABPTS) examinations
	  f. Evidence of professional outreach (e.g. scholarship of engagement or submitted white paper)
	  g. Evidence of a book contract
	  h. Evidence of commercialization of research-derived products and services
		4.0-5.0

Meets expectations for merit	At least two of the following:
	  a. Evidence of peer-reviewed manuscript or book chapter in press or published
	  b. Evidence of funded external grant
	  c. Evidence of editorship of a journal, book, or set of conference proceedings
	  d. Evidence of peer-reviewed or refereed Conference Education Session at a state, national or international professional conference
	  e. Evidence of significant contribution (at least 40 items) to the National Physical Therapy Licensure Examination (NPTE), or a significant contribution (at least 20 items) to one of the American Board of Physical Therapy Specialties (ABPTS) examinations
	  f. Evidence of professional outreach (e.g. scholarship of engagement or submitted white paper)
	  g. Evidence of a book contract
	  h. Evidence of commercialization of research-derived products and services
		2.0-3.9

Fails to meet expectations for merit	Merely submitting one piece of evidence is consistent with failing to meet expectations for merit in scholarship:
	
	One of the following:
	  a. Evidence of a peer reviewed manuscript or book chapter in press or published
	  b. Evidence of funded external grant
	  c. Evidence of editorship of a journal, book, or set of conference proceedings
	  d. Evidence of peer-reviewed and/or invited presentations at professional meetings/conferences
	  e. Evidence of professional outreach (e.g. scholarship of engagement or submitted white paper)
	  f. Evidence of a book contract
	  g. Evidence of commercialization of research-derived products and services
	  h. Evidence of contribution (at least 20 items) to the National Physical Therapy Licensure Examination (NPTE), or a significant contribution (at least 10 items) to one of the American Board of Physical Therapy Specialties (ABPTS) examinations
		1.0-1.9

Unacceptable	This is defined as: 1. No evidence of scholarship submitted; or 2. No materials submitted	0-0.9

Merit Score for Scholarly Activity (to be completed by merit committee member): __

Evaluation Rating Category	SERVICE Expected levels of accomplishment on service performance indicators (or their equivalent)	Possible Merit Score for Service

Exceeds expectations for merit	#1 and #2 are required, as well as three additional criteria from #3, in order to exceed expectations for merit in service.
	
	1. Evidence of membership and participation on two SoPT Committee's
	2. Participate in at least two of the following activities per year:
	    a. Commencement
	    b. Orientation
	    c. Homecoming activities
	    d. Recruitment activities
	    e. Advising activities
	    f. Other
	3. Three or more of the following:
	    a. Evidence of membership and active participation on a College level committee
	    b. Evidence of membership and active participation on a University level committee
	    c. Evidence of membership in a professional physical therapy or education organization at the state, national, or international level
	    d. Evidence of a leadership role of a professional physical therapy or education organization (e.g. board member, treasurer, secretary)
	    e. Evidence of volunteer or community service related to physical therapy or education.
		4.0-5.0

Meets expectations for merit	#1 and #2 are required, as well as two additional criteria from #3, in order to meet expectations for merit in service.
	
	1. Evidence of membership and participation on two SoPT Committee's
	2. Participate in at least two of the following activities per year:
	    a. Commencement
	    b. Orientation
	    c. Homecoming activities
	    d. Recruitment activities
	    e. Advising activities
	    f. Other
	3. Two of the following:
	    a. Evidence of membership and active participation on a College level committee
	    b. Evidence of membership and active participation on a University level committee
	    c. Evidence of membership in a professional physical therapy or education organization at the state, national, or international level
	    d. Evidence of a leadership role of a professional physical therapy or education organization (e.g. board member, treasurer, secretary)
	    e. Evidence of volunteer or community service
		2.0-3.9

	related to physical therapy or education.	

Fails to meet expectations for merit	Submitting evidence that merely addresses #1, #2, and only one additional criteria from #3, results in a score indicative of failing to meet expectations for merit in service.
	
	1. Evidence of membership and participation on two SoPT Committee's
	2. Participate in at least two of the following activities per year:
	    a. Commencement
	    b. Orientation
	    c. Homecoming activities
	    d. Recruitment activities
	    e. Advising activities
	    f. Other
	3. One of the following:
	    a. Evidence of membership and active participation on a College level committee
	    b. Evidence of membership and active participation on a University level committee
	    c. Evidence of membership in a professional physical therapy or education organization at the state, national, or international level
	    d. Evidence of a leadership role of a professional physical therapy or education organization (e.g. board member, treasurer, secretary)
	    e. Evidence of volunteer or community service related to physical therapy or education.
		1.0-1.9

Unacceptable	This is defined as:
	
	No materials submitted or no service beyond #1 and #2 (see below).
	
	1. Evidence of membership and participation on two SoPT Committee's
	2. Participate in at least two of the following activities per year:
	    a. Commencement
	    b. Orientation
	    c. Homecoming activities
	    d. Recruitment activities
	    e. Advising activities
	    f. Other
		0-0.9

Merit Score for Service (to be completed by merit committee member): __

SUMMARY FORM

Faculty Member_____ *Tenure Track Faculty*	Merit Score for Teaching X 50%*	Merit Score for Scholarly Activity X 30%*	Merit Score for Service X 20%*	Overall Weighted Scored (sum of each score)
Committee member #1				
Committee member #2				
Committee member #3				
Average of three committee members				

Faculty Member_____ *Qualified Rank Faculty*	Merit Score for Teaching X 60%*	Merit Score for Scholarly Activity X 20%*	Merit Score for Service X 20%*	Overall Weighted Scored (sum of each score)
Committee member #1				
Committee member #2				
Committee member #3				
Average of three committee members				

*Work effort may vary if Director has approved assignments/duties. The BUFM shall provide the allocation of effort with merit documents
**If Scholarly activity included in a QRF merit, the faculty member shall indicate what percent of workload is allocated to activity.

Interpretation:

Overall Merit Score	Interpretation
4.0-5.0	Activities in area cumulatively exceed expectations and reflect a clear and significant level of accomplishment beyond what is normal for an individual with a given faculty rank in the school.
2.0-3.9	Activities in area cumulatively meet expectations and reflect standard levels of performance for the school.
1.0-1.9	Activities in area cumulatively do not meet expectations and fall below the standard levels of performance for the school.
0–0.9	Activities in area cumulatively are unacceptable and fall well below the standards of performance for the school.

Merit Committee Composition and the Election/Appointment Process:

The Merit Committee shall:
1. Consist of three (3) BUFMs, who are eligible to serve on merit committees according to the CBA.
2. Be elected by the School BUFMs.
3. Committee members serve a two-year term, elected by school faculty, with one member having served in the previous year.
4. Committee members elect a chair.
5. Annually evaluate all BUFMs of the School in relation to the merit criteria for teaching, scholarly/creative activity and service commensurate with each individual's assigned allocation of effort.
   a. Allocation of effort may vary based on coordinator duties, course revision, program development, or any other agreed upon duties.
6. The "General Procedure for Faculty Evaluation and Score of Merit" as outlined in the "Merit Policy Part I: University-Wide Processes Required by the CBA" will be followed:
   a. Each faculty member will confirm their allocation of effort with the Director and document this in the merit dossier.
   b. The School merit committee is responsible for assigning an overall merit score to every faculty member.
   c. Faculty members who fail to submit a merit portfolio by the deadline will receive an automatic rating of "unacceptable" and will not be eligible for any merit salary adjustments. A merit rating of "unacceptable" will be independent from the APR/EPR process.
   d. The submitted merit dossier must include the elements outlined in the School's merit policy document.
   e. A description of how the overall merit score is calculated, including how annual scores are averaged over a three-year period, can be found in the School's merit policy document.
   f. The School may report its merit score recommendation to no greater than one-tenth of a decimal place.
   g. Merit score recommendations shall be reported by the Chair of the merit committee to the BUFMs. After the opportunity for rebuttal by the faculty, the Chair shall forward the merit recommendations to the School Director. The School Director will share the recommendations of the School Merit Committee along with their own independent merit recommendations to the Dean.

Elements of the Merit Dossier:
Table for Quantitative Student Evaluation Scores for previous academic year only:

Table 1: Course Evaluation Table

Semester and Year	Course #	Number of students	Number of responses	Course Mean	Course SD	CHHS Mean	CHHS SD
Average of all Course Scores							

The submitted merit dossier must include the following elements:
1. Title page, including name, rank, percentage allocation of effort for each area of evaluation, and workload reduction agreed upon by BUFM and Director of School of Physical Therapy.
2. CV (in BGSU format) highlighting the activities related to teaching, scholarly/creative activity, and service during the previous academic year (based on time of hire). Highlighted items should not have been submitted to the merit committee in previous years.
3. Completed table of quantitative student evaluation scores (from University Wide Evaluation of Teaching and Learning Effectiveness).
4. Ancillary documents, which are appended to the CV and may include:
    a. Peer teaching observations and evaluations.
    b. Copy of all student narrative comments as well as a reflective analysis of student comments.
    c. Self-evaluations of teaching effectiveness that provide evidence of measures used and changes made based on feedback.
    d. Evidence of active service on committees or within professional organizations.
    e. Evidence of active community service related to field of expertise.
    f. Two previous academic year Merit letters indicating the overall merit scores, if requesting an average of three scores.

Special Notes:
Documents submitted for publication under review in a previous merit submission may not be considered if listed as under review again. Documents submitted for publication that were in press or published in a previous merit submission may not be considered if listed as in press or published again. Funded grants may be counted annually for multiyear grant(s). Grants that are annual, can only be submitted in the year of receipt, unless evidence is provided that a renewal application, extension, or request for further funding was submitted and has been awarded or is in progress of being awarded.

Calculation of Overall Merit Score:
Separate evaluations are conducted within the areas of teaching, scholarly/creative activity, and service using a five-point scale with the following anchors: 0-0.9 (unacceptable); 1.0 - 1.9 (fails to meet expectations for merit); 2.0 - 3.9 (meets expectation for merit at the low and high end, respectively); 4.0 - 5.0 (exceeds expectations for merit at the low and high end, respectively). Typical allocation of effort for QRF is 60% teaching, 20% scholarly/creative activity, and 20% service. For TTF, allocation is 50% teaching, 30% scholarship, and 20% service. Workload reduction may be approved for coordinators and other special projects as approved by the Director of the School of Physical Therapy and Dean of CHHS. Three BUFM committee members' will each independently assign a merit score for each of the performance areas (teaching, scholarly/creative activity, and service). The overall merit score is computed using the following algorithm, which accounts for weighted allocations of effort for each performance area.

The Algorithm is:
(Teaching merit score X allocation of effort) + (Scholarly/Creative Activity merit score X allocation of effort) + (Service merit score X allocation of effort) = overall merit score.
Scoring results of the three BUFM committee members will be averaged (arithmetical mean) to determine a merit score, which will be communicated to the School Director, as well as the individual faculty member. The School Director will also conduct a merit review and determine merit scores for each performance area (teaching, scholarly/creative activity, and service) and compute an overall merit score using the algorithm, which will be communicated to the Dean. Merit scores from the Committee as well as the School Director will be shared with the individual faculty member.
An unacceptable score in any single area (Teaching, Scholarly/Creative Activity, or Service), will make the faculty member ineligible to receive merit during that year.

Additional Academic Unit Merit Policy Information:
Because a faculty member's accomplishments in any given year are subject to fluctuation (e.g. FMLA, FIL, etc.), a three-year average (arithmetic mean) will be calculated from the current year's overall score and the overall merit scores from the previous two years (if requested by the BUFM). The BUFM will provide the Merit letters from the previous two academic years to the committee as part of the merit dossier, requesting to use the average of three years scores.

Approved by the School of Physical Therapy BUFM 7/30/21

Approved: _____   Date _____
Stephanie Thurmond (Aug 12, 2021 08:09 CDT)
Dr. Stephanie Thurmond, Director School of Physical Therapy

Approved: _____   Date _____
James Ciesla (Aug 12, 2021 09:13 EDT)
Dr. Jim Ciesla, Dean of The College of Health and Human Services

Approved: _____   Date _____
Joe Whitehead (Aug 13, 2021 10:55 EDT)
Dr. Joe Whitehead, Provost/ Senior VP