

Merit Document
Department of Accounting and Management Information Systems

Preamble

Merit raises refer to the component of salary raises that are provided to Department bargaining unit faculty members who meet or exceed their assigned unit performance expectations. In any given year, it is possible that all of the Bargaining Unit Faculty Members in an academic unit may be eligible for merit salary raises. Merit is calculated during spring semester based on performance during the previous calendar year. Merit salary raises are added to base salary for the ensuing fiscal year (on September 1 for Bargaining Unit Faculty Members on 9-month contracts, and on July 1 for Bargaining Unit Faculty Members on 12-month contracts).

Merit eligibility for faculty members will be based on meeting or exceeding unit performance expectations for merit in the Department in the following areas: Teaching, Scholarship, and Service. Each faculty member will receive an overall merit score which will identify whether s/he did not meet, met, or exceeded expectations for merit. The overall merit score will include ten categories or rating levels to allow for greater discrimination among levels of performance; each of the categories or rating levels on the overall merit score must clearly identify whether it does not meet expectations for merit, meets expectations for merit, or exceeds expectations for merit. For example, using the minimum ten categories or rating levels, the following evaluation concepts would be included: 1.0-4.9= Does not meet expectations for merit; 5.0-7.9 = Meets expectations for merit; 8.0-10.0 = Exceeds expectations for merit.

Both the merit committee of the academic unit and the chair may make recommendations to the Dean for allocation of merit dollars and/or percentages. However, as provided for by Section 11.2 of Article 17 of the Collective Bargaining Agreement, the Dean is not bound by such recommendations and the determination of the actual merit increase is within the Dean's reasonable discretion.

1. Merit Criteria, Performance Indicators and Expectations, and Calculation of Merit Scores

The merit criteria (i.e., Teaching, Scholarship, and Service), performance indicators and expectations for the criteria, and the calculation of the component merit scores (i.e., Teaching, Scholarship, and Service) are contained in Appendix A.

2. General Procedure for Faculty Evaluation and Score of Merit

- 2.1. **Allocation of Effort.** Prior to the beginning of the calendar year, each faculty member will confirm his/her allocation of effort (e.g., 50/30/20 for teaching, scholarship, and service) with the chair.
- 2.2. **Merit Committee.** The Department merit committee is responsible for assigning an overall merit score to every bargaining unit faculty member. The committee will consist of three elected full time faculty members elected by the full time faculty each serving a three year term. The terms shall be staggered so that only one member will be replaced each year. The member with the greatest current tenure on the committee shall serve as chair of the

- committee. If a member of the committee cannot serve in his/her capacity, a replacement member shall be elected to complete the term. Faculty cannot serve two consecutive terms.
- 2.3. **Failure to Submit.** Faculty members who fail to submit a merit portfolio by the deadline will receive an automatic rating of "does not meet expectations" and will not be eligible for a merit salary increase or the market adjustment from the Fixed Market Pool (Article 17, section 7.1).
- 2.4. **Merit Dossier.** The submitted merit dossier must include the Accounting and Management Information System's Faculty Service report and a current Vita.
- 2.5. **Overall Merit.** The individual component merit scores for teaching effectiveness, scholarship, and service are combined to arrive at an overall merit score. The allocation of effort mutually agreed upon by the chair and the individual at the beginning of the year is taken into account when determining overall merit score.

Once the merit committee has reached consensus on component merit scores on each performance areas (Teaching, Scholarship, and Service), the overall merit score is computed using a simple algorithm taking into account the weighted allocation of effort for each performance area:

$$\text{Overall Merit Score} = [\text{Teaching Merit Score} * \text{Teaching Allocation of Effort}] + [\text{Scholarship Merit Score} * \text{Scholarship Allocation of Effort}] + [\text{Service Merit Score} * \text{Service Allocation of Effort}]$$

Those faculty members who attain an overall merit score in excess of 4.0 and meet one of the four the requirements for AACSB faculty qualifications are eligible for merit as defined in the collective bargaining agreement. Additional merit will be awarded based on the following calculations:

$$\text{Department additional merit} = \sum \text{Full time faculty members salaries} * \text{The additional merit percentage per the collective bargaining agreement} + \sum \text{Full time faculty members salaries not meeting merit standards} * \text{the merit percentage per the collective bargaining agreement.}$$

$$\text{Individual merit factor} = \text{Overall merit score} * \text{Full time faculty member's salary.}$$

$$\text{Department merit factor} = \sum \text{Individual merit factor of each full time faculty member}$$

$$\text{Each individual full time faculty member's additional merit} = \text{that faculty members individual merit factor} / \text{Department merit factor} * \text{Department additional merit.}$$

- 2.6 **Decimal Convention.** An academic unit may report its merit score recommendation to no greater than one-tenth decimal place (for example, a unit using 1-7 categories or rating levels may assign a score of 3.1 or 5.9 but may not assign a score of 3.15 or 5.975).

3. Significant Dates for Merit Consideration and Appeals

January 31: Last date for faculty merit dossiers to be submitted to an academic unit.

The merit committee of the academic unit is urged to work informally with all faculty being reviewed to resolve any factual or interpretive issues in advance of making recommendations to the chair .

February 28: Academic unit faculty committee's merit score recommendation to the chair (with a copy to the faculty member).

March 7: Last date for faculty members to appeal the committee's recommendation to the chair (with a copy to the committee).

March 31: Chair's merit score recommendation to the Dean (with copies to the committee and faculty members).

April 7: Last date for faculty member to appeal the chair's merit score recommendation to the Dean (with copy to the chair). The faculty member may raise in any appeal to the Dean: (i) the chair's merit score recommendation, and (ii) only those aspects of the committee's recommendation that the faculty member has previously raised in the faculty member's appeal to the chair. Issues related to the committee's recommendation not raised previously with the chair (where the faculty member either knew or through the exercise of reasonable diligence should have known) are not preserved for appeal to the Dean, shall not be considered by the Dean, and shall not be the basis or grounds for any grievance by the BGSU-FA.

April 30: Dean's recommendation to the Provost. Thereafter the Provost and Dean may confer through on or about May 19.

On or about May 20: Dean issues final determination regarding merit.

4. Special Circumstances

4.1. Consideration of Special Circumstances as Required by the Collective Bargaining Agreement

- 4.1.1. **Faculty Exchange Leave** (Article 21, Section II: subsection 1.7). Faculty members shall be entitled to full consideration for merit. The merit evaluations for the faculty members will include consultation with the host institution.
- 4.1.2. **Leaves with Extramural Salary Paid through the University Payroll System** (Article 21, Section III: subsection 1.3) Faculty members shall be entitled to full consideration for merit. The merit evaluations for the faculty members will include consultation with the sponsoring government agency or private foundation.
- 4.1.3. **Unpaid Leave - 100% time** (Article 21, Section IV: subsection 5). Faculty members will not be eligible for merit in any calendar year for which 100% unpaid leave was taken that is unrelated to Family Medical Leave. If related to Family Medical Leave, performance expectations for merit evaluations shall be prorated.
- 4.1.4. **Sick Leave** (Article 21, Section VIII: subsection 9.1). Performance expectations for merit evaluations shall be prorated for faculty members on sick leave for 40 or more days during the calendar year.
- 4.1.5. **Parental Leave** (Article 21, Section IX: subsection 3). Unit Faculty Member who takes parental leave under this Article will only be evaluated for performance during the time in which he or she was not on parental leave (including use of sick leave in addition to parental leave). Performance expectations for merit evaluations that are expressed quantitatively shall be prorated. The Department Chair's/School Director's evaluation shall include a description of the methods used for prorating.
- 4.1.6. **Partial Unpaid Leave - 50% time** (Article 21, Section X: subsection 3.3) Faculty members will not be eligible for merit in any calendar year for which 50% unpaid leave

was taken that is unrelated to Family Medical Leave. If related to Family Medical Leave, performance expectations for merit evaluations shall be prorated.

4.1.7. **Faculty Improvement Leave** (Article 22, Section 7.3.3) Faculty members shall be entitled to full consideration for merit. The merit evaluations for the faculty members will include consideration of the report submitted to the President detailing accomplishments during the FIL.

4.2. **Consideration of Other Special Circumstances**

4.2.1. **New Faculty Hires.** New faculty members whose employment begins in the fall semester shall be entitled to full consideration for merit. Performance expectations for merit evaluations shall be prorated.

4.2.2. The unit's faculty advisory body may also consider special circumstances not covered in 4.1 above and make a recommendation to the unit chair or director. Such exceptional circumstances might include a leave without pay to take a short-term research appointment, a leave without pay to participate in professional development, or other leave without pay that enhances the productivity of the faculty member and the reputation of the institution.


5. Amendment of Merit Policy

The unit faculty may amend performance indicators, performance expectations, and the methods for combining this information into both component and overall merit scores at any time. Amendments to the merit policy must be approved by the Dean and Provost/SVPAA. Approved amendments to the merit policy shall not be applied retroactively in the calculation of the previous year's merit scores.

6. Additional Information

6.1 **AACSB Accreditation.** Being an AACSB accredited institution is vital to the mission of the College of Business. Accordingly, faculty are expected to maintain faculty qualifications under AACSB standards to be eligible for merit.


Approved by the Department of Accounting and Management Information Systems at the February 4, 2015 faculty meeting.



David Stott, Chair of Accounting and MIS

Date March 19, 2015

Approved:



Raymond Braun, Dean of the College of Business

Date March 31, 2015

Approved:



Rodney Rogers, Provost/ Senior VP

Date 4/15/15

APPENDIX A

The following rubrics indicate the Department of Accounting and Management Information System's approved performance indicators used to evaluate faculty performance expectations in the areas of teaching, scholarship, and service. Merit committee members will individually review the faculty member's merit dossier and provide a score in each of the areas of teaching, scholarship, and service.

Evaluation Rating Category	TEACHING Expected levels of accomplishment on teaching performance indicators (or their equivalent)	Possible Merit Score for Teaching
	The initial basis for evaluation will be a simple average of AMIS student evaluation scores. A 3.0 average will be associated with 6.0 merit score. Adjustments to that score will be made for innovative teaching practices, engagement in professional activities related to teaching effectiveness, the publication of case studies or book chapters, three course preparations per semester or four course preparations per year, teaching senior and graduate level courses, or other factors or activities relating to teaching the faculty member deems worth additional consideration. The merit committee member may also adjust the merit score for their interpretation of the student evaluation score for issues that they feel may have inflated the score	
Exceeds expectations for merit	A faculty member who receives an average student evaluation that exceeds 3.0 and has experienced some or all of the factors listed above. A faculty member who receives an average student evaluation of 3.0 or less but has experienced sufficient other factors listed above to exceed expectations for merit.	6.1 – 10.0
Meets expectations for merit	A faculty member who receives an average student evaluation that is at or below 3.0 but above a 2.0 and has insufficient other factors listed above to be evaluated as exceeds expectation for merit.	2.1 - 6.0
Fails to meet expectations for merit	A faculty member who receives an average student evaluation that is below 2.0	0.1-2.0

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

Evaluation Rating Category	SCHOLARSHIP Expected levels of accomplishment on scholarship performance indicators (or their equivalent)	Possible Merit Score for Scholarship
	The basis for evaluation is the current years AACSB standard for academic and professional qualification. Meeting one of the four requirements will provide a score of 6.0	
Exceeds expectations for merit	Meets one of the four current year's AACSB standard for academic and professional qualifications and having activity in this area that exceeds the requirements. Additional certifications, publications in A journals, additional professional activities, publications in excess than those required, serving on editorial boards, or other activities the faculty member deems additional consideration.	6.1 – 10.0
Meets expectations for merit	Meets one of the four current year's AACSB standard for academic and professional qualifications	6.0
Fails to meet expectations for merit	Fails to meet one of the four current year's AACSB standard for academic and professional qualifications	0.1-5.9

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

Evaluation Rating Category	<p style="text-align: center;">SERVICE Expected levels of accomplishment on service performance indicators (or their equivalent)</p>	Possible Merit Score for Service
	A faculty member who serves on two committees, regularly attends faculty meetings in the department and the college, and actively participates in some University, college, department, and professional activities will receive a merit score of 6.0. Chairing a committee that meets at least six times annually will be considered as serving on two committees.	
Exceeds expectations for merit	A faculty member who exceeds the above criteria or other activities the faculty member deems consideration will exceed the expectations for merit.	6.1 – 10.0
Meets expectations for merit	The minimum level for meeting the expectations for merit will be a faculty member who regularly attends department faculty meetings and actively participates in college and department activities.	2.1 – 6.0
Fails to meet expectations for merit	A faculty member who does not regularly attend faculty meetings or does not actively participate in college and department activities.	0.1-2.0

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

SUMMARY FORM

(to be completed with agreement reached by all members of the merit committee):

Faculty Member	Merit Score for Teaching	Merit Score for Scholarship	Merit Score for Service
Consensus Score			