

**Merit Policy**  
**Department of Higher Education and Student Affairs (HESA)**  
**Bowling Green State University**

Preamble

Merit raises refer to the component of salary raises that are provided to department/school 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 HESA in the following areas: teaching, scholarship, and service. All faculty members will receive an overall merit score that will identify whether they did not meet, met, or exceeded expectations for merit. The overall merit score will include five or more 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 five categories or rating levels, the following evaluation concepts would be included: 1 = Does not meet expectations for merit; 2/3 = Meets expectations for merit; 4/5 = 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 and Appendix C.

2. General Procedure for Faculty Evaluation and Score of Merit

- 2.1. Prior to the beginning of the calendar year, all faculty members will confirm their allocation of effort (e.g., 40/40/20 for teaching, scholarship, and service) with the chair.
- 2.2. The HESA merit committee is responsible for assigning an overall merit score to every bargaining unit faculty member. Two full-time HESA faculty will be elected annually to serve on the HESA merit committee for a one-year term. The committee members will review the "Faculty Report of Meritorious Accomplishments" (Appendix C) submitted by each faculty member in which faculty members request points for their various activities. The committee members will review the report submitted by each faculty member; assign points for activities identified on the report and CV; determine the points for any "other" teaching, scholarly, or service items requested (i.e., lines 29, 77, 104); total the final points

for each domain; and assign a merit score as detailed in Appendix A. The committee may adjust the number of points requested by faculty for their activities. The committee will reach consensus on the final merit rating.

- 2.3. 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. The submitted merit dossier must include the following elements
  - Faculty Report of Meritorious Accomplishments (Appendix C). Faculty will request points for activities in teaching, scholarship, and service.
  - Curriculum vitae in BGSU format with achievements of the previous calendar year highlighted electronically) [e.g., Member, ACPA Books and Media Editorial Board (2013-2016)]. After the highlighted item on the CV, faculty member will write “Line XX” to indicate the spreadsheet line on which that item is claimed.
  - The course evaluation report for each class.
  - If faculty include items from the list indicated with an asterisk (\*), those items must be attached to the merit dossier. (All other items will be highlighted on the CV.)
- 2.5. The merit score in each of the three areas (teaching, scholarship, service) will be multiplied by the allocation of effort for that domain and then totaled for an overall merit score, as described in Appendix A and Appendix B.
- 2.6. 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). *HESA uses a five-point scale.*

### 3. Significant Dates for Merit Consideration and Appeals

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

February 1-February 28: The merit committee reviews submitted merit dossiers. 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 is submitted 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 is submitted 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

- 4.1.1.1. **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.
- 4.1.1.2. **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.
- 4.1.1.3. **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.
- 4.1.1.4. **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.
- 4.1.1.5. **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 evaluation shall include a description of the methods used for prorating.
- 4.1.1.6. **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.

4.1.1.7. **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

4.2.1.1. **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.

4.2.1.2. 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.

Approved by the Department of Higher Education and Student Affairs on January 30, 2015.

Maureen E. Wilson  
Maureen E. Wilson, Chair

Date 03.18.2015

Approved: Brad Colwell, Dean  
W. Bradley Colwell, Dean of College of Education and Human Development

Date 3-19-15

Approved: Rodney Rogers  
Rodney Rogers, Provost/Senior VP

Date 3/23/15

Appendix A: Merit Criteria, Performance Indicators and Expectations, and the Calculation of Component Merit Scores

Appendix B: Determination of Overall Merit Score Recommendation

Appendix C: Faculty Report of Meritorious Accomplishments

## APPENDIX A

### Merit Criteria, Performance Indicators and Expectations, and the Calculation of Component Merit Scores

Merit criteria are limited to three areas: teaching, scholarship, and service. To determine whether faculty members have failed to meet, met, or exceeded expectations for merit, a merit system should identify performance indicators and expected levels of performance for each of the relevant areas noted above. The merit system should also describe how information on the various performance indicators are combined to calculate the relevant component merit scores (i.e., teaching, scholarship, and service).

#### Overview

Merit will be based on meeting or exceeding unit performance expectations that are assigned to the HESA member on the following performance criteria: teaching, scholarship, and service. Each of the aforementioned criteria (e.g., teaching) will be evaluated using a number of performance indicators (e.g., quantitative student evaluations of teaching). Merit committee members will review information submitted by each faculty member to make an evaluation rating on each performance indicator, providing some basis or justification of each rating where appropriate.

Evaluation ratings provided for all performance indicators within each performance criteria will be combined by each member of the merit committee to reach a component rating for each of the relevant performance criteria (teaching, scholarship, and service). Merit committee members will meet as a committee to review and reach consensus on component ratings for each of the relevant performance criteria, using the summary form provided. The component ratings may include any number of values or rating levels, but they must clearly identify whether the component reflects performance that fails to meet expectations, meets expectations, or exceeds expectations for merit.

The merit committee will then assign an overall merit rating using the approach found in Section 2.5 of the merit policy. 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 fails to meet expectations, meets expectations, or exceeds expectations for merit.

#### Individual Merit Summary (to be completed by the merit committee)

	Points	Merit Score (Based on Tables Below)	Allocation of Effort	Adjusted Merit Score
				Merit Score X Allocation of Effort
Teaching				
Scholarship				
Service				

<b>Teaching Merit Score (point allocation)</b>	<b>Definition and Description</b>
<b>Exceeds Expectations for Merit in Teaching</b> <i>4-5 points</i>	Merit Score 5 = 170 or more points Merit Score 4 = 140-169 points
<b>Meets Expectations for Merit in Teaching</b> <i>2-3 points</i>	Merit Score 3 = 110-139 points Merit Score 2 = 80-109 points
<b>Fails to Meet Expectations for Merit in Teaching</b> <i>1 point</i>	Merit Score 1 = 0-79 points
<b>Merit Score for Teaching (to be completed by merit committee member):</b>	

<b>Scholarship Merit Score (point allocation)</b>	<b>Definition and Description</b>
<b>Exceeds Expectations for Merit in Scholarship</b> <i>4-5 points</i>	Merit Score 5 = 200 or more points Merit Score 4 = 150-199 points
<b>Meets Expectations for Merit in Scholarship</b> <i>2-3 points</i>	Merit Score 3 = 100-149 points Merit Score 2 = 50-99 points
<b>Fails to Meet Expectations for Merit in Scholarship</b> <i>1 point</i>	Merit Score 1 = 0-49 points
<b>Merit Score for Scholarship (to be completed by merit committee member):</b>	

<b>Service Merit Score (point allocation)</b>	<b>Definition and Description</b>
<b>Exceeds Expectations for Merit in Service</b> <i>4-5</i>	Merit Score 5 = 100 or more points Merit Score 4 = 75-99 points
<b>Meets Expectations for Merit in Service</b> <i>2-3</i>	Merit Score 3 = 50-74 points Merit Score 2 = 25-49 points
<b>Fails to Meet Expectations for Merit in Service</b> <i>1</i>	Merit Score 1 = 0-24 points
<b>Merit Score for Service (to be completed by merit committee member):</b>	

**DEPARTMENT SUMMARY FORM****(To be completed with agreement reached by all members of the merit committee):**

<b>Faculty Member</b>	<b>Merit Score for Teaching</b>	<b>Merit Score for Scholarship</b>	<b>Merit Score for Service</b>	<b>Total Adjusted Merit Score</b>	<b>Final Recommendation</b>
<i>Faculty member 1</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>		<input type="checkbox"/> Fails to meet basic expectations for merit <input type="checkbox"/> Meets basic expectations for merit <input type="checkbox"/> Exceeds expectations for merit
<i>Faculty member 2</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>		<input type="checkbox"/> Fails to meet basic expectations for merit <input type="checkbox"/> Meets basic expectations for merit <input type="checkbox"/> Exceeds expectations for merit
<i>Faculty Member 3</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>		<input type="checkbox"/> Fails to meet basic expectations for merit <input type="checkbox"/> Meets basic expectations for merit <input type="checkbox"/> Exceeds expectations for merit
<i>Faculty Member 4</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>		<input type="checkbox"/> Fails to meet basic expectations for merit <input type="checkbox"/> Meets basic expectations for merit <input type="checkbox"/> Exceeds expectations for merit
<i>Faculty Member 5</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>		<input type="checkbox"/> Fails to meet basic expectations for merit <input type="checkbox"/> Meets basic expectations for merit <input type="checkbox"/> Exceeds expectations for merit
<i>Faculty Member 6</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>		<input type="checkbox"/> Fails to meet basic expectations for merit <input type="checkbox"/> Meets basic expectations for merit <input type="checkbox"/> Exceeds expectations for merit

**APPENDIX B****Determination of Overall Merit Score Recommendation**

	<b>Calculation</b>	<b>Interpretation</b>
1	Adjusted merit score of 1.0-1.4	Fails to meet basic expectations for merit; Recommendation for no merit
2	Adjusted merit score of 1.5-2.4	Meets basic expectations for merit; Eligible for merit
3	Adjusted merit score of 2.5-3.4	
4	Adjusted merit score of 3.5-4.4	Exceeds expectations for merit; Eligible for merit
5	Adjusted merit score of 4.5-5.0	



## APPENDIX C

## Faculty Report of Meritorious Accomplishments

<b>TEACHING</b>		#	Multiplier	Points Requested
<b>Student Evaluations (Count all courses taught (including summer). Report course means (Items 3-12). Attach course evaluation report for each class.</b>				
	<i>*Attach a copy of the one-page evaluation printout for each</i>			
1	Section #1 mean			
2	Section #2 mean			
3	Section #3 mean			
4	Section #4 mean			
5	Section #5 mean			
6	Section #6 mean			
7	Average of course means			
8	Multiply Line 7 by 20 (Round to nearest whole number)			
<b>Independent Studies Supervised (List names of students and # of credit hours)</b>				
9	Graduate or undergraduate independent study (1 point per credit hour)	# hours	Up to 1	
10	Practica supervised (not for paid summer course)		Up to 1	
<b>Other Teaching</b>				
11	Guest lecture		Up to 2	
<b>Committee Supervision and Membership (Include last name of students)</b>				
12	Dissertation committee chair, dissertation completed		Up to 10	
	<i>Names:</i>			
13	Master's thesis committee chair, completed		Up to 12	
	<i>Names:</i>			
14	Dissertation committee member, dissertation completed		Up to 6	
	<i>Names:</i>			
15	Master's thesis committee member, completed		Up to 6	
	<i>Names:</i>			
16	Dissertation committee chair, proposal approved		Up to 6	
	<i>Names:</i>			
17	Dissertation committee member, proposal approved		Up to 4	
	<i>Names:</i>			
18	Preliminary examination committee chair, completed		Up to 6	
	<i>Names:</i>			
19	Preliminary examination committee member, completed		Up to 4	

	<i>Names:</i>			
<b>Curriculum Development (Identify course)</b>				
20	Course proposal (green sheet submitted)		Up to 5	
21	*Extensive course modification ( <i>Attach documentation</i> )		Up to 5	
<b>Professional Development</b>				
22	Attend formal workshop or seminar intended to develop teaching talent (e.g., CTLT or conference session)		Up to 3	
	<i>List here:</i>			
<b>Graduate Department Advising</b>				
23	One point per advisee* (attach CSP & HIED advising lists)		Up to 1	
<b>Peer and Self Evaluations Attach review letters and self-assessment (Items 24-26)</b>				
24	*Conduct a peer review of teaching and provide feedback letter		Up to 3	
25	*Be reviewed by a peer and receive feedback letter (submit)		Up to 3	
26	*Conduct self-assessment of teaching and student evaluations (submit)		Up to 2	
<b>Teaching Awards (Identify award)</b>				
27	Special award/citation (college- or university-wide award)		Up to 15	
28	Special award/citation (professional association; must be competitive)		Up to 20	
<b>Other Teaching Activities</b>				
29	List any other activities that you consider teaching. Include a short description and the number of points you consider each to be worth.			

<b>SCHOLARSHIP</b>		#	Multiplier	Points Requested
<b>Professional Conferences or Workshops Attended</b>				
30	International, national, regional, or state		Up to 5	
31	Local (3 hours minimum duration)		Up to 1	
32	Local colloquium (five points maximum)		Up to 1	
<b>Competitive Grants Received [External grants or competitive BGSU (e.g., Partnerships for Community Action)]</b>				
33	Less than \$10,000		Up to 10	
34	\$10,000 - \$100,000		Up to 25	
35	\$100,001-\$500,000		Up to 50	
36	More than \$500,000		Up to 75	
37	Successive Year of Competitive Multi-Year Grant		Up to 10	
<b>Competitive Grants Submitted</b>				
38	External grants less than \$10,000		Up to 3	
39	External grants \$10,000 - \$100,000		Up to 5	
40	External grants \$100,001-\$500,000		Up to 10	
41	External grant more than \$500,000		Up to 15	

<b>Authored Publications [See service section for editorial activities] – Count in Copyright Year, etc.</b>			
42	Professional book published (e.g., textbook, scholarly book, monograph)		Up to 150
43	Professional book co-author published (e.g., textbook, scholarly book, monograph)		Up to 100
44	New edition of professional book published (e.g., textbook, scholarly book, monograph)		Up to 75
45	Professional book chapter published (e.g., textbook, scholarly book, monograph)		Up to 50
46	Professional book chapter co-author published (e.g., textbook, scholarly book, monograph)		Up to 35
47	Professional book editor published (conceived idea, submitted it, got chapter authors)		Up to 40
48	Refereed journal article published		Up to 75
49	Article reprinted or abstracted: previously published		Up to 10
50	Non-refereed journal article (also ERIC) published		Up to 20
51	Media/book review published		Up to 10
<b>Pre-Publication Activity</b>			
52	Professional book author contract secured		Up to 40
53	Professional book co-author contract secured		Up to 30
54	Professional book editor contract secured		Up to 30
55	Professional book co-editor contract secured		Up to 20
56	Professional book chapter contract secured		Up to 10
57	Professional book chapter co-authored secured		Up to 7
58	Professional book submitted		Up to 50
59	Professional book chapter submitted		Up to 20
60	Refereed journal article submitted for review		Up to 15
61	Revisions submitted for book chapter or journal article		Up to 10
62	Publication acceptance received but not yet published (in press)		Up to 10
<b>Non-Journal Publications</b>			
63	Newspaper/newsletter feature article		Up to 5
64	Letter to editor (in professional journal)		Up to 2
65	Conference proceedings (entire paper)		Up to 5
<b>Professional Conference Papers and Presentations (formal paper or workshop presentation)</b>			
66	National or international (based on conference location)		Up to 15
67	Regional, state, or local (based on conference location)		Up to 10
68	BGSU (include RD Poster Session and Brown Bag Paper)		Up to 5
<b>Professional Conference Panel Member, Discussant, or Chair</b>			
69	International panel member or discussant		Up to 8

70	National panel member or discussant		Up to 6	
71	Regional or state panel member or discussant		Up to 4	
72	Local panel member or discussant		Up to 2	
73	Conference session chair		Up to 1	
<b>Research/Scholarship/Fellowship/Special Award</b>				
74	In-house, school or department competition		Up to 5	
75	College-wide competition		Up to 10	
76	University or broader based competition		Up to 15	
<b>Other Scholarly Activities</b>				
77	List any other activities that you consider research or scholarship. Include a short description and the number of points you consider each to be worth.			

<b>SERVICE</b>		#	Multiplier	Points Requested
<b>Annual Editorial Activities (Editing and/or reviewing the work of others)</b>				
78	Professional book editor (e.g., textbook, scholarly book, monograph)		Up to 20	
79	Professional book co-editor (e.g., textbook, scholarly book, monograph)		Up to 15	
80	National or international journal editor (per issue)		Up to 20	
81	National or international journal assistant/associate editor (per issue)		Up to 10	
82	Regional or state journal editor (per issue)		Up to 15	
83	Regional or state journal assistant/associate editor (per issue)		Up to 8	
84	Newsletter editor (per issue)		Up to 5	
85	Book manuscript reviewer for publisher (entire book)		Up to 10	
86	Book manuscript reviewer (prospectus or partial book)		Up to 5	
87	Manuscript editorial board reviewer for journal (per article)		Up to 2	
88	Professional conference proposal reviewer (per conference)		Up to 2	
89	Grant proposal reviewer (per proposal)		Up to 3	
<b>Consultantships and Speaking Engagements</b>				
90	Consulting, one time formal arrangement		Up to 3	
91	Speaker for local organizations		Up to 2	
<b>Committee Service and Student Group Advising</b>				
92	Department, college, university committee chair		Up to 6	
93	Department, college, university committee member		Up to 4	
94	International or national professional association president		Up to 50	
95	International or national professional association officer		Up to 25	
96	Regional/state/local association president		Up to 25	
97	Regional/state/local association officer		Up to 7	
98	Professional association committee chair		Up to 10	
99	Professional association committee member		Up to 5	

100	Advisor for a student organization		Up to 3	
	<i>Note that such committee work that is judged by the participant to involve inordinate time commitment should be duly noted for additional points under other service activities.</i>			
<b>Service Awards</b>				
101	Special award/citation (local, department)		Up to 5	
102	Special award/citation (college, regional)		Up to 10	
103	Special award/citation (national, international)		Up to 15	
<b>Other Service Activities</b>				
104	List any other activities that you consider service. Include a short description and the number of points you consider each to be worth. (Estimate 5 hours of service per point.)			

Revised March 17, 2015