Merit Document
School of Human Movement, Sport, and Leisure Studies

Preamble

Merit raises refer to the component of salary raises that are provided to 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 School of Human Movement, Sport, and Leisure Studies in the following areas: Teaching/Learning Effectiveness, Research/Creative Productivity, and Service Effectiveness. 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 includes 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: 0/1 = does not meet expectations for merit; 2/3 = meets expectations for merit; 4/5 = exceeds expectations for merit.

Both the merit committee of the School and the School Director may make recommendations to the Dean for allocation of merit dollars and/or percentages. 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/learning effectiveness, research/creative productivity, and service effectiveness), performance indicators and expectations for the criteria, and the calculation of the component merit scores (i.e., teaching/learning effectiveness, research/creative productivity, and service effectiveness) are contained in Appendix A.

2. General Procedure for Faculty Evaluation and Score of Merit

2.1. Prior to the beginning of the calendar year, each faculty member confirms his/her allocation of effort (e.g., 60/25/15 for teaching/learning effectiveness, research/creative productivity and service effectiveness) with the School Director.

2.2. The School of HMSLS merit committee is responsible for assigning an overall merit score to every bargaining unit faculty member.

2.2.1. The School of HMSLS merit committee is comprised of five full-time faculty members (i.e., tenure track and non-tenure track) elected for staggered three year terms by all full-time TTF and NTTF faculty members in the School.

2.2.2. Merit committee members select one of their members as the presider/chair whose responsibility it is to call meetings as well as summarize and report the results of deliberations to the School of HMSLS Director.

2.3. Faculty members who fail to submit a merit portfolio by the deadline will receive an automatic rating of "0"/"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:

2.4.1. An abbreviated curriculum vitae (CV) using BGSU format containing only activities from the calendar year under review

2.4.2. A table of student evaluations of instruction (SEIs) for all courses taught during the calendar year under review plus the allocation of scholarly effort for the year

2.4.3. An *optional* 1-page abstract clarifying activities or results the significance of which may not be apparent to the merit committee (e.g., abnormally low SEIs; committees requiring extraordinary effort; unpublished research work during the previous year)

2.5. Calculating individual merit scores.

2.5.1. Each merit committee member individually evaluates each merit component for each TTF/NTTF School faculty member on a rating scale from 0-5 where 0-1 = no materials submitted or does not meet expectations; 2-3 = meets expectations; and 4-5 = exceeds expectations. Committee members do not rate themselves or participate in the discussion of their own merit dossiers.

2.5.2. When the committee convenes, the median score of the five (or four for merit committee members) scores for each component becomes the summary score for that component for that individual.

2.5.3. The median scores for each of the three components represent the merit profile for each HMSLS faculty member. Merit committee members consider each faculty member's profile using their allocation of effort to make a holistic judgment of whether the dossier fails to meet basic expectations for merit (not eligible for merit), meets expectations (eligible for merit), or exceeds expectations (eligible for merit). The median holistic rating from the five Committee members represents the overall merit score that will be reported to the HMSLS School Director.

2.6. An academic unit may report its merit score recommendation to no greater than one-tenth decimal place (for example, a unit using 0-5 categories or rating levels may assign a score of 2.5 or 4.5 but may not assign a score of 2.15 or 4.975). The School of HMSLS merit scores are reported as integer values except where median scores are the average of the two middle scores.

2.7. The Bargaining Unit Faculty Members for the School of HMSLS recommend that the Dean allocate merit dollars so that all faculty within each merit category (either meets expectations for merit or exceeds expectations for merit) receive the same merit increase regardless of the overall merit rating score within the merit category. % or Dollars ?

3. Significant Dates for Merit Consideration and Appeals

January 31 (or next business day when Jan. 31 is a weekend day): 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 HMSLS School Director.

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

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

March 31: HMSLS School Director'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 HMSLS School Director's merit score recommendation to the Dean (with copy to the School Director). The faculty member may raise in any appeal to the Dean: (i) the School Director'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 School Director. Issues related to the committee's recommendation not raised previously with the School Director (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 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 HMSLS School 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 School of HMSLS 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
No additional information need to be reported here.

Approved by the School of Human Movement, Sport, and Leisure Studies after discussion and amendments made at the 27th day of January 2015 Faculty Meeting

Stephen J. Langendorfer, Ph.D., Director
School of Human Movement, Sport, Leisure Studies — Date 30 January 2015

Approved: Brad Colwell, Dean — Date 2/17/15
W. Brad Colwell, Dean
College of Education and Human Development

Approved: — Date 2/27/15
Rodney Rogers, Provost/ Senior VP

APPENDIX A

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

Merit criteria for the School of HMSLS are organized to three areas: Teaching Effectiveness, Research/Creative Productivity, and Service Effectiveness. To determine whether the HMSLS faculty members have failed to meet, met, or exceeded expectations for merit, the HMSLS merit system identifies performance indicators and expected levels of performance for each of the relevant areas noted above. The merit system also describes how information on the various performance indicators are combined to calculate the relevant component merit scores (i.e., teaching effectiveness, research/creative productivity, and service effectiveness).

The School of HMSLS merit system has employed an adaptation of the third exemplar from the merit template Appendix A.

Overview

Merit is based on meeting or exceeding School of HMSLS performance expectations that are assigned to the School of HMSLS faculty member on the following performance criteria: Teaching/Learning Effectiveness, Research/Creative Productivity, and Service Effectiveness. Each of the aforementioned criteria (e.g., teaching/learning effectiveness) are evaluated using identified performance indicators (e.g., quantitative student evaluations of instruction). Merit committee members review information submitted by each HMSLS faculty member and assign a numerical score for each criteria using a rating scale anchored with examples of expected levels (or their equivalent) on the performance indicators. Merit committee members meet as a committee to review and reach consensus on component scores for each of the relevant performance criteria using the summary form provided. The component scores may include any range of values, but they must clearly identify whether the assigned score on the criteria (e.g., teaching/learning effectiveness) reflects performance that 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, and failing to meet expectations 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 and discipline.
>
> **Meets expectations for merit**: Activities in area cumulatively meet expectations and reflect standard levels of performance for the school and discipline.
>
> **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 and discipline.

The merit committee assign an overall merit rating using the approach found in Section 2.5 of the merit policy. The overall merit scores range from 0 – 5 with the overall merit rating scores reflects performance that fails to meet expectations (0-1.4), meets expectations (1.5-.3.4), or exceeds expectations (3.5-5) for merit.

Teaching/Learning Effectiveness

The effectiveness of one's scholarly facilitation of teaching/learning should be evaluated through performance indicators drawn from the four teaching/learning domains. Documentation of one's teaching/learning effectiveness shall include more than student evaluations of instruction (SEI) by providing evidence of proficient implementation of pedagogical techniques consistent with a coherent teaching/learning philosophy. Six assessment criteria for the scholarship of teaching include clear learning outcomes, knowledgeable background in the content, proficient instructional techniques, evaluation of teaching/learning, effective communication, and a reflective self-evaluative critique.

Four domains are used to evaluate teaching/learning effectiveness:
(1) Undergraduate teaching;
(2) Graduate teaching;
(3) Instructional development; and
(4) Other contributions to student learning.

Evaluation Rating Category	TEACHING/LEARNING EFFECTIVENESS Expected levels of accomplishment on teaching/learning performance indicators (or their equivalent)	Possible Merit Score for Teaching*
Exceeds expectations for merit	Teaching/learning effectiveness exceeds expectations for rank as indicated below. Degree to which research/creative work productivity exceeds expectations differentiated by 4 or 5.	*4 – 5*
Meets expectations for merit	**Professors** shall demonstrate a consistently high level of teaching/ learning effectiveness. **Associate Professors** shall demonstrate a high level of teaching/learning effectiveness. **Assistant Professors** shall demonstrate effective teaching and shall have shown steady improvement in their teaching/ learning effectiveness. **Senior Lecturers** shall demonstrate consistently high levels of teaching/learning effectiveness. **Lecturers** shall demonstrate a high level of teaching/learning effectiveness. **Instructors** shall demonstrate effective teaching and shall have shown steady improvement in their teaching/ learning effectiveness.	*2 – 3*
Fails to meet expectations for merit	No teaching merit materials submitted = 0 Teaching merit materials demonstrate below rank expectations = 1	*0 – 1*

**Insert score values on a scale that includes at least five numerical values, e.g., 1-5point scale.*

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

Research/Creative Work Productivity

The quality of research/creative works is defined by the profession and is verified by a process of internal and external peer reviews as well as by the application of the six standards for evaluating scholarship of engagement. Documentation of research/ creative productivity shall provide evidence of a focused agenda for research/ creative work, contributions to the knowledge base, and/or the creative practice of one's discipline such as through demonstrated achievement of the standards of scholarship of engagement.

Four domains are used to evaluate research/creative work:

(1) Publications/presentations/performances;

(2) Sponsored program extramural support;

(3) Institutional outreach; and
(4) Reputation within the discipline/profession as a result of significant contributions to the knowledge base and/or creative practice of one's discipline.

Evaluation Rating Category	RESEARCH/CREATIVE PRODUCTIVITY Expected levels of accomplishment on teaching performance indicators (or their equivalent)	Possible Merit Score for Research*
Exceeds expectations for merit	Research or creative work productivity exceeds expectations for rank as indicated below. Degree to which research/creative work productivity exceeds expectations differentiated by 4 or 5.	*4 – 5*
Meets expectations for merit	**Professors** shall establish a reputation within their profession/ discipline as evidenced by an ongoing and continuous record of productive research scholarship in their line of inquiry, or unusually significant research, or the equivalent in the creative or performing arts. **Associate Professors** shall demonstrate research/creative productivity as evidenced by adequate quality and quantity of publications/ presentations/ performances in their line of inquiry. **Assistant Professors** shall provide evidence of research/ creative productivity associated with a written, focused research/creative success plan identifying a line of inquiry and shall have begun to disseminate the results of this line of inquiry through publications/ presentations/ performances. *If assigned load credit for research/ creative productivity*, **Senior Lecturers** shall provide evidence of a research/creative work success plan and continuing dissemination of research/ creative work in the form of appropriate publications/ presentations/ performances. *If assigned load credit for research/ creative productivity*, **Lecturers** shall provide evidence of a written, focused research/ creative success plan and shall begin to disseminate the results of this plan through appropriate publications/ presentations/ performances. *If assigned load credit for research/ creative productivity*, **Instructors** shall provide evidence of a written, focused research/ creative success plan and shall begin to disseminate the results of this plan through appropriate publications/ presentations/ performances.	*2 – 3*
Fails to meet expectations for merit	No merit materials provided = 0 Research/creative work productivity fall below rank expectations = 1	*0 – 1*

**Insert score values on a scale that includes at least five numerical values, e.g., 1-5point scale.*

Merit Score for Research/Creative Productivity (to be completed by each merit committee member): _____

Service Effectiveness

The quality of one's service effectiveness (a.k.a., scholarships of application and engagement) can be documented using the six Carnegie criteria for evaluating scholarly activity (i.e., identified goals/outcomes,

knowledge of background/history, use of appropriate procedures, rigor of analysis of outcomes, clarity of communication, presence of a reflective self-evaluation).

There are four major domains/categories in which service effectiveness may be demonstrated:

(1) Internal University service (i.e., involvement in internal affairs and institutional governance of program, School, College, University)

(2) Assigned administrative service responsibilities

(3) External community service (professional expertise shared with external communities as in the case of scholarships of engagement and application), and

(4) Professional service (i.e., contributions to a faculty member's profession or disciplinary field).

Faculty members are expected to meet the minimum service expectations by rank.*

*Extensive: Represents a leadership role; *Satisfactory: Represents an active, involved participant's role; *Beginning: represents an initial role as a committee member or other contributions to service.

Evaluation Rating Category	**SERVICE EFFECTIVENESS** Expected levels of accomplishment on teaching performance indicators (or their equivalent)	Possible Merit Score for Service*
Exceeds expectations for merit	Provides service at levels exceeding rank expectations as indicated below. The degree to which it exceeds expectations differentiated by either 4 or 5 rating.	4 – 5
Meets expectations for merit	**Professors** shall provide extensive* or satisfactory* service in program, School, College, and University as well as at national or international levels. **Associate Professors** shall provide extensive service in at least two areas (e.g., program, School, College, University communities and councils, state, regional, or national professional service) and satisfactory or beginning service in other areas. **Assistant Professors** shall provide satisfactory service in at least two areas (e.g., program, School, College, University, to the profession) and beginning service in two other areas. **Senior Lecturers** shall provide extensive service in at least one area and satisfactory service in three or more areas including service to appropriate professional organizations. **Lecturers** shall provide satisfactory service to the program and School or College, and satisfactory or beginning involvement in appropriate professional service. **Instructors** shall provide satisfactory service to the Program and in one other area plus beginning service in at least one area.	2 – 3
Fails to meet expectations for merit	Did not submit merit materials = 0 Does not provide satisfactory service based on rank expectations above = 1	0 – 1

**Insert score values on a scale that includes at least five numerical values, e.g., 1-5point scale.*

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

HMSLS HOLISTIC JUDGMENT SUMMARY FORM

(to be completed as indicated in Section 2.5):

Merit Committee members	Member A	Member B	Member C	Member D	Member E	Median	Median Holistic Judgment (circle)
Faculty Members							
TTF Faculty member 1 Teaching/Learning Effectiveness	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert median score*	Does not meet expectations Meets expectations Exceeds expectations
Faculty member 1 Research/Creative Productivity	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert median score*	
Faculty member 1 Service Effectiveness	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert median score*	
NTTF Faculty member 2 Teaching/Learning Effectiveness	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert median score*	Does not meet expectations Meets expectations Exceeds expectations
Faculty member 2 Service Effectiveness	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert numerical score 0-5*	*Insert median score*	

Appendix B
Options for Determining Overall Merit Score Recommendations

The individual component merit scores for teaching/learning effectiveness, research/creative work productivity, and service effectiveness are combined to arrive at a merit profile that is used to identify an overall merit score. Allocation of effort is taken into account when determining overall merit score. The overall merit may include five or more values or rating levels than five, but it must clearly identify whether the overall merit rating reflects performance that fails to meet expectations, meets expectations, or exceeds expectations for merit.

Three exemplars are available for adaptation and use: holistic judgment of the merit committee, a guiding rubric based on ratings in each performance area, or through the use of a simple algorithm that mathematically weights each performance criteria.

Exemplar A: Holistic Judgment of Merit Committee

The School of HMSLS accepted the following exemplar as guidance to the merit committee for taking allocation of effort into consideration when holistically combining their consensus ratings for teaching/learning effectiveness, research/creative work productivity, and service effectiveness to arrive at an overall merit score.

Overall Merit Score	Interpretation
0 – 1	Does not meet expectations for merit; Recommendation for no merit
2 – 3	Meets expectations for merit; Eligible for merit
4 - 5	Exceeds expectations for merit; Eligible for merit