

Merit Document
School of Intervention Services

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 School of Intervention Services in the following areas: Teaching Effectiveness, Research/Creative Work, and Service. Each faculty member will receive an overall merit score, which will identify whether she/he did not meet, met, or exceeded expectations for merit. The overall merit scores will range from "0" to "5". To meet merit expectations, faculty need an overall (average) score of at least 2 across all areas with a minimum score of 2 in each category. Faculty below this requirement will be identified as failing to meet expectations for merit. Faculty members earning overall scores between "2" and "3.2" will be identified as meeting expectations for merit. Finally, those faculty members with overall scores of 3.3 or higher with scores of 4 in at least two categories will be identified as exceeding expectations for merit. For clarification and details, please see the appendixes.

Both the Merit Committee of the academic unit and the Director 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 Effectiveness, Research/Creative Work, and Service), performance indicators and expectations for the criteria, and the calculation of the component merit scores (i.e., Teaching Effectiveness, Research/Creative Work, and Service) 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 will confirm his/her allocation of effort (e.g., for Tenure-Track and Tenured Faculty, 60/20/20 for teaching, scholarship, and service; and for Non-Tenure Track Faculty, 80/20) with the director.
- 2.2. The School of Intervention Services Merit committee is responsible for assigning an overall merit score to every bargaining unit faculty member. The committee consists of one representative from each program area. The representatives are elected by all school faculty members to serve a two-year term.

- 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: title page, table of contents, self-filled table of meritorious achievements during the previous calendar year (see template and example in Appendix C); updated CV with highlighted activities during the previous calendar year (not submitted to the merit committee in previous years); teaching narrative (from a few lines to no more than 2/3 page, 1.5 line spacing); quantitative student teaching evaluations from the previous year (see template in Appendix D) and any other proof of achievement; research narrative, (from a few lines to no more than 2/3 page, 1.5 line spacing) and copies of publications or any other proof of achievement; service narrative of similar length and any necessary evidence materials. If using the category “Other” in your summary or any other table, use the narratives to explain your case. In the merit documents, narratives are different from tenure and promotion submissions and they are used for explanation of achievements only. In its shortest form (a few lines) the narrative serves as a cover page for the section/category.
- 2.5. See Appendix B for the SIS approved process of calculating overall merit score.
- 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).

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 members being reviewed to resolve any factual or interpretive issues in advance of making recommendations to the director.

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

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

March 31: 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 director’s merit score recommendation to the Dean (with copy to the Director). The faculty member may raise any appeal to the Dean: (i) the 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 Director. Issues related to the committee’s recommendation not raised previously with the 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 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.

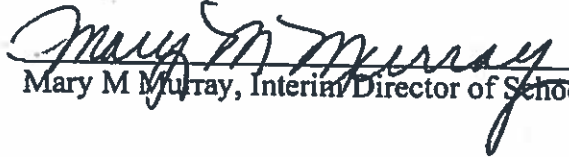
5. Amendment of Merit Policy

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

Please see all Appendixes

Approved by the School of Intervention Services on 2/18/2015 by a vote of 12/17 For and 1 - Abstain

 Date 3/4/2015
Mary M Murray, Interim Director of School of Intervention Services

Approved:  Date 3/5/2015
Brad Colwell, Dean of College of Education and Human Development

Approved:  Date 3/7/2015
Rodney Rogers, Provost/ Senior VP

Attachments:

- Appendix A:** Merit Criteria, Performance Indicators and Expectations, and the Calculation of Component Merit Scores
- Appendix B:** Determining Overall Merit Score Recommendations
- Appendix C:** Self-Filled Table of Meritorious Achievements
- Appendix D:** Table for Quantitative Student Evaluation Scores

APPENDIX A

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

Evaluation Rating Category	<p style="text-align: center;">TEACHING</p> <p style="text-align: center;">Expected levels of accomplishment on teaching performance indicators (or their equivalent)</p>	Merit Score for Teaching
Exceeds Expectations for Merit	<ul style="list-style-type: none"> • Quantitative student evaluations average of all courses equal to or exceeding 4.20 on a 5-point scale. • High level of involvement in other teaching activities, including 5 or more indicators delineated in "Meets Expectations for Merit" section. 	5
Exceeds Expectations for Merit	<ul style="list-style-type: none"> • Quantitative student evaluations average of all courses equal to or exceeding 4.0 on a 5-point scale. • High level of involvement in other teaching activities, including 4 or more indicators delineated in "Meets Expectations for Merit" section. 	4
Meets Expectations for Merit	<ul style="list-style-type: none"> • Quantitative student evaluations average of all courses equal to or exceeding 3.7 on a 5-point scale. • High level of involvement in other teaching activities, including 3 or more indicators delineated in "Meets Expectations for Merit" section. 	3
Meets Expectations for Merit	<ul style="list-style-type: none"> • Quantitative student evaluations average of all courses is at least 3.5 on a 5-point scale. • In addition, 2 indicators of teaching effectiveness listed below: <ul style="list-style-type: none"> • Innovative teaching practices and high impact learning activities. • Engagement in professional development related to teaching effectiveness • Teaching Awards and Distinctions • Development of New Courses (Provide copy of EDHD blue sheets) • Curriculum Modification of Existing Courses (provide copy of EDHD blue sheets) substantive changes or changes to multiple courses • Academic Advising (quantity of students and quality of advising are considered) • Student Professional Development Activities of substantial value, e.g. a full-day student career day, a series of extracurricular seminars, an exhibition, etc. • Integration of Teaching Initiatives, involving Engagement/Service Learning (provide description) • Participation in a learning community, tech boot camp, etc. • Grants to support teaching activities (not travel grants) • Accreditation reports (use only once, either in teaching or in service) • Study abroad and extended student trips off campus • Thesis/Dissertation Chairs • Thesis/Dissertation Committees • Comprehensive Examination Chairs (thesis, dissertations) • Comprehensive Examination Committees (thesis, dissertations) • Supervision of Independent Studies (provide list) • Master's Project Chair/Committees • Undergraduate Honor's Project Chair/Advisor • Undergraduate Honor's Project Committee • Independent studies • Other (please describe) 	2
Fails to Meet Expectations for Merit	<ul style="list-style-type: none"> • The Quantitative student evaluations average of all courses are below 3.5 on a 5 point scale. • Low level of involvement in other teaching activities. • Limited or no engagement in professional activities related to teaching effectiveness. • Minimal to no involvement in additional indicators of teaching effectiveness. 	1
	<ul style="list-style-type: none"> • The Quantitative student evaluations average of all courses are below 3.2 on a 5 point scale. • There are major flaws and problems in the faculty's teaching. • No materials were submitted. 	0

Merit Score for Teaching (to be completed by Merit Committee members):

 X

Evaluation Rating Category	RESEARCH/CREATIVE WORK Expected levels of accomplishment on teaching performance indicators (or their equivalent)	Possible Merit Score for Research
Exceeds Expectations for merit	<ul style="list-style-type: none"> ● Two peer-reviewed publications (Provide copies). 	5
Exceeds Expectations for merit	<ul style="list-style-type: none"> ● One peer-reviewed publication (Provide copy). 	4
Meets Expectations for merit	<ul style="list-style-type: none"> ● A combination of three or more of the items listed below. 	3
Meets Expectations for merit	<ul style="list-style-type: none"> ● A combination of two of the following items: <ul style="list-style-type: none"> ● External Grant Funded (Provide copy) ● External Grant Submitted (Provide copy) ● Internal Research Grant, funded (excluding travel grants) ● Internal Research Grant, submitted (excluding travel grants) ● Book (Provide copy) ● Book Chapter ● Published Symposia ● Published Book Review in a peer-reviewed journal ● Invited Presentations, International, National, or Regional Conferences ● Refereed Presentation or Poster at International, National, or Regional Conferences ● Abstract published in conference proceedings or peer-reviewed journals (if not mentioned as paper/poster presentation) ● Positions as Associate Editors or Guest Editor of a peer-reviewed journal (please describe) ● Permanent member of a journal editorial board (not ad hoc reviewer) ● Refereed Creative Work (at national or regional adjudicated exhibitions or competitions) ● Other (please describe) <p>* You may want to identify items that are part of the Scholarship of Engagement. ** Provide reprints and proof for all achievements listed in your report.</p>	2
Fails to Meet Expectations for Merit	<ul style="list-style-type: none"> ● Minimal evidence of scholarship (one item in the above list)*. * In rare cases, when a faculty has only one item, but a very substantial one, that faculty might qualify for level 2. 	1
	<ul style="list-style-type: none"> ● No evidence of scholarship. ● No materials were submitted. 	0

Merit Score for Research (to be completed by Merit Committee members):

 X

Evaluation Rating Category	SERVICE Expected levels of accomplishment on teaching performance indicators (or their equivalent)	Possible Merit Score for Service
Exceeds Expectations for Merit	<ul style="list-style-type: none"> • The faculty member demonstrates significant service involvement at the program, school, college, university, and/or professional levels. At least 5 committees or committee-comparable activities are required. <p>Examples of recognized service at each level are described in the "Meets Expectations for Merit" section below. Overall contributions should be considerably above the merit level.</p>	5
Exceeds Expectations for Merit	<ul style="list-style-type: none"> • The faculty member demonstrates significant service involvement at the program, school, college, university, and/or professional levels. At least 4 committees or committee-comparable activities are required. <p>Examples of recognized service at each level are described in the "Meets Expectations for Merit" section below. Overall contributions should be considerably above the merit level.</p>	4
Meets Expectations for Merit	<ul style="list-style-type: none"> • The faculty member demonstrates meaningful service involvement at the program, school, college, university, and/or professional levels. At least 3 committees or committee-comparable activities are required. 	3
Meets Expectations for Merit	<ul style="list-style-type: none"> • The faculty member demonstrates meaningful service involvement at the program, school, college, university, and/or professional levels. At least 2 committees or committee-comparable activities are required. • Examples of recognized service at each level are described below: <ul style="list-style-type: none"> • Profession <ul style="list-style-type: none"> Member of Committees, Task Forces, Boards Chair of Committees, Task Forces, Boards (implies higher level of engagement than a committee member) Officer Positions in Professional Associations (Vice-President, Secretary, Treasurer, etc.) Conference Planning Professional Recognition/Awards Service to Government Agency Expert Testimony Moderator/Respondent of Conference Sessions Reviewing Manuscripts (list journal(s) and number reviewed each year) Reviewing Grants (list agency or organization, grant program, number reviewed, etc.) Reviewing Conference Abstracts (list conference(s) and number reviewed, etc.) National Grant Panels Media Appearances at national and regional level (regional like Midwest) Other • Program/School <ul style="list-style-type: none"> Committees, Task Forces (e.g., Search Committees, Standing Committees) Chair of, Task Forces, Boards, etc. (implies higher level of engagement than a committee member) Assigned Administrative Duties* (e.g. Graduate Coordinator, Program Director) Supervision of Student Clubs, Organizations, and Activities Recruitment and Retention Other • College/University/Community <ul style="list-style-type: none"> Committees, Task Forces Chair of Committee Other * Community service must be related to faculty's professional area. 	2
Fails to Meet Expectations for Merit	The faculty member demonstrates little to no service involvement at the program, school, college, university, and/or professional levels. Examples of recognized service at each level are described above in the meets expectation section.	1
	<ul style="list-style-type: none"> • No service at all • No materials were submitted. 	0

Merit Score for Service (to be completed by Merit Committee members):

 X

Appendix B Determining Overall Merit Score Recommendations

Overall Merit Score: The average of all scores and additional criteria^{a, b, c}

Exceeds Expectations for Merit ^a	3.3 – 5.0
Meets Expectations for Merit ^c	2.0 – 3.2
Fails to Meet Expectations	<2.0

^a Each category (Teaching, Research/Creative Work, and Service) is calibrated on its own scale (0, 1, 2, 3, 4, 5). Tenure track/tenured faculty (TTF) are rated in all three areas while non-TTF are rated in teaching and service only.

^b To achieve "Exceeds Expectations for Merit," a faculty member needs to score 4 in two or more categories.

^c To achieve "Meets Expectations for Merit," the applicant has to achieve meritorious level of 2 in each required category.

SUMMARY FORM (Examples)

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

Faculty Member	Merit Score for Teaching	Merit Score for Research/Creative Work	Merit Score for Service	Average Score	Merit Category
TTF Person 1	5	4	1	3.3 Fail Did not meet target level 2 in each category	Fails to meet expectations for merit
TTF Person 2	2	2	2	2	Meets expectations for merit
TTF Person 3	5	4	2	3.7	Exceeds expectations for merit
Non-TTF examples					
Person 1	5	NA	1	3 Fail Did not meet target level 2 in each category	Fails to meet expectations for merit
Person 2	5	NA	2	3.5	Meets expectations for merit
Person 3	5	NA	3	4	Exceeds expectations for merit

Appendix C

Self-Filled Table of Meritorious Achievements (example)

TEACHING	Merit Score for Teaching
<ul style="list-style-type: none"> ● Quantitative student evaluations average of all courses are 4.17, exceed 4.00 on a 5-point scale. ● High level of involvement in other teaching activities, including 4 or more indicators delineated in "Meets Expectations for Merit" section: <ul style="list-style-type: none"> – Attended 3 professional development sessions at conferences and the BGSU Center for Faculty Excellence. – One Dissertation Committee, member. – Two Independent Studies – Advised 30 students, provided timely and high quality advice (no complaints from students). – Student Professional Development Activities of substantial value – organized a full day event Career Day <p>Proof for all achievements is in CV or in the teaching section of the merit binder.</p>	

Merit Score for Teaching (to be completed by Merit Committee members): 4

RESEARCH/CREATIVE WORKS	Merit Score for Research
<ul style="list-style-type: none"> ● A combination of two of the following items: <ul style="list-style-type: none"> ● Internal Research Grant, submitted (excluding travel grants) ● One Invited Presentation <i>Copy and paste here reference from your CV</i> ● Two Refereed Presentations: <i>Copy and paste here reference from your CV</i> ● One Abstract published in conference proceedings <i>Copy and paste here reference from your CV</i> <p>Reprints and proof for all achievements are in the merit binder.</p>	

Merit Score for Research (to be completed by Merit Committee members): 2

SERVICE	Merit Score for Service
Expected levels of accomplishment on teaching performance indicators (or their equivalent)	
<ul style="list-style-type: none"> ● At least 5 committees or committee-comparable activities: <ul style="list-style-type: none"> – BGSU Parking Committee – BGSU FDR Committee – EDHD Scholarship Committee (Chair) – Advisor of XYZ Student Organization – Board Member, XYZ Association – Reviewer for XYZZ Conference – Reviewer for ZZZZ Journal – Recruitment faculty for the program area 	

Merit Score for Service (to be completed by Merit Committee members): 5

SUMMARY FOR THIS FACULTY:

Faculty Member	Merit Score for Teaching	Merit Score for Research/Creative Works	Merit Score for Service	Average Score	Merit Category
Mary Johnston	4	2	5	3.7	Exceeds expectations for merit

Appendix D**Table for Quantitative Student Evaluation Scores**

Semester	Course	Number of Students	Number of Respondents	Course Mean	Course SD	SIS Mean	SIS SD	Comments to the Personnel Committee
Student evaluations average of all courses for this year:								