Merit Document
Department of Applied Sciences

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 Applied Sciences Department in the following areas: Teaching/Librarian Effectiveness, Research/Creative Work, 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 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: 1/2 = Does not meet expectations for merit; 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/Librarian Effectiveness, Research/Creative Work, and Service), performance indicators and expectations for the criteria, and the calculation of the component merit scores (i.e., Teaching/Librarian 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., 50/30/20 for teaching, scholarship, and service) with the chair.

   2.2. The Applied Sciences Department merit committee is responsible for assigning an overall merit score to every bargaining unit faculty member. The merit committee is made up of three members of the Department with no specifications of rank or years of service. Members are elected by the department at a department meeting. Merit committee members should have staggered terms of office so that two of the three people will carry over to serve on the committee in the next year. This will provide continuity and experience in procedures and scoring. To safeguard the impartiality of the merit committee, individual terms should be no longer than three years. No member of the department merit committee will evaluate him/herself.

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: [updated cv highlighting activities completed during the previous calendar year, peer and student teaching evaluations from the previous calendar year, documentation of new course materials/innovation, documentation of conference/workshop/publication/exhibition acceptance, etc. as appropriate, and completed merit review template (see Appendix A).

2.5. The overall merit score is calculated as indicated in 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).

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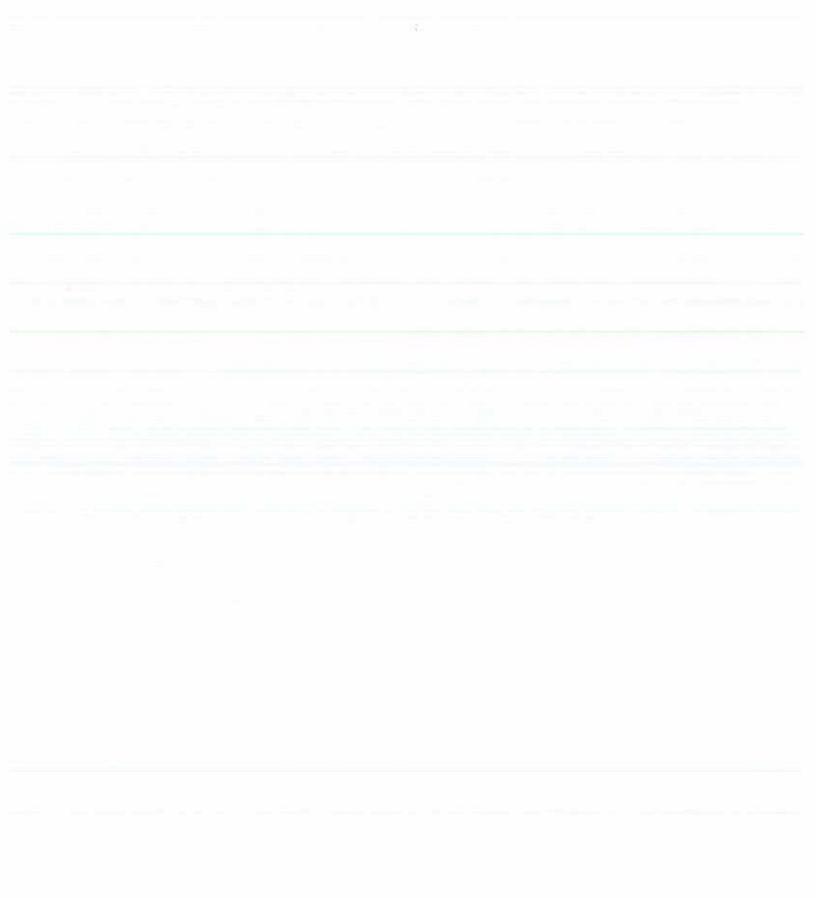
April 30: Dean's recommendation to the Provost. Thereafter the Provost and Dean may confer through on or about May 19.

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

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.
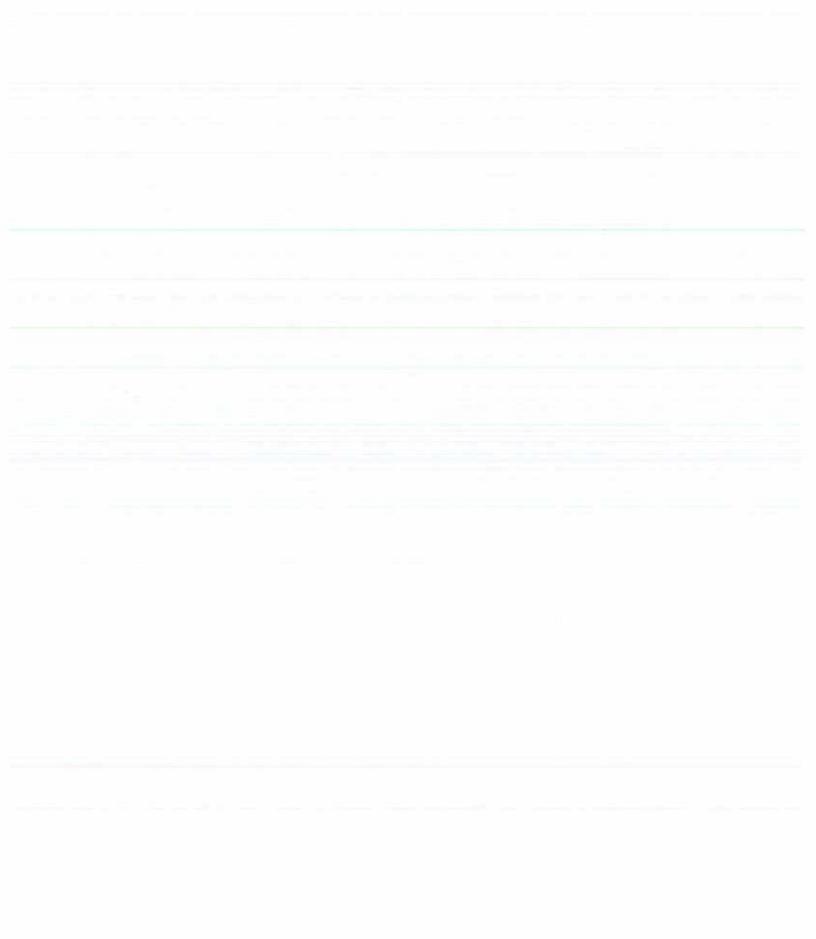
4.1.2 **Leaves with Extramural Salary Paid through the University Payroll System** (Article 21, Section III: subsection 1.3) Faculty members shall be entitled to full consideration for merit. The merit evaluations for the faculty members will include consultation with the sponsoring government agency 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

4.1.8 **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.

4.1.9 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.
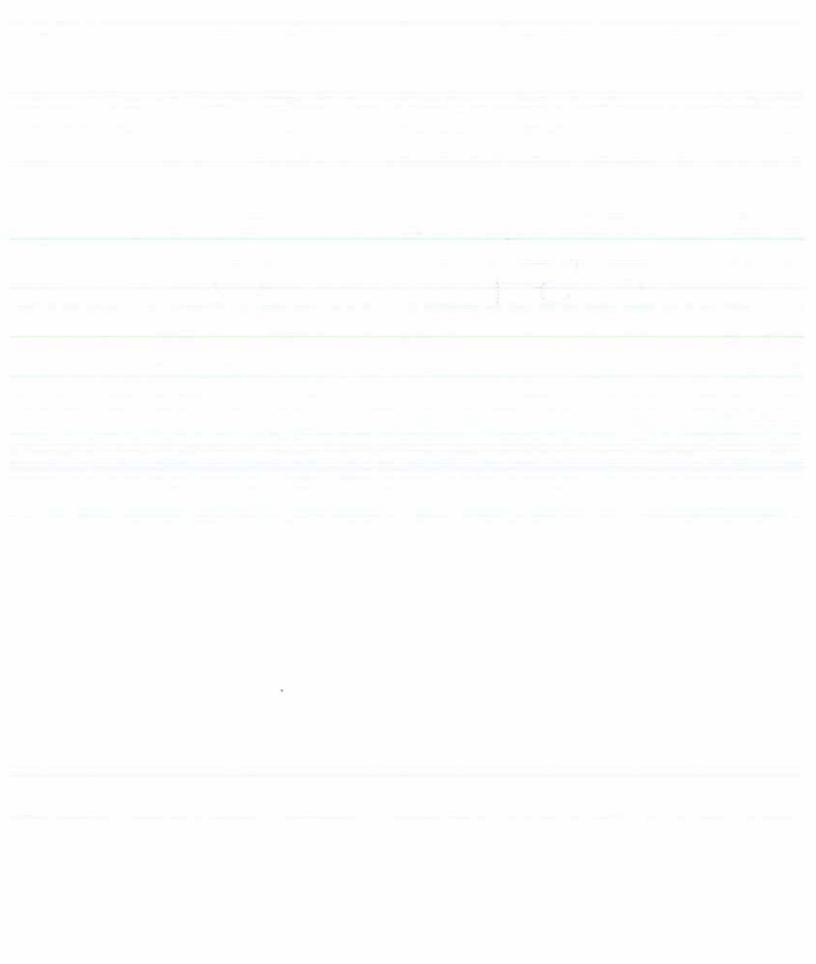
5. Amendment of Merit Policy

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

Approved by the Department of Applied Sciences at the Month, Date, Year Faculty Meeting

Cynthia Miglietti, Chair, Applied Science

Date 3/6/2017

Approved:

Andrew Kurtz, Dean of BGSU Firelands

Date 3/6/2017

Approved:

Rodney Rogers, Provost and Senior VP

Date 3/8/17

APPENDIX A

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

Overview

Merit will be based on meeting or exceeding unit performance expectations that are assigned to the department/school member on the following performance criteria: Teaching/Librarian Effectiveness, Research/Creative Work, 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. No member of the merit committee will evaluate him/herself.
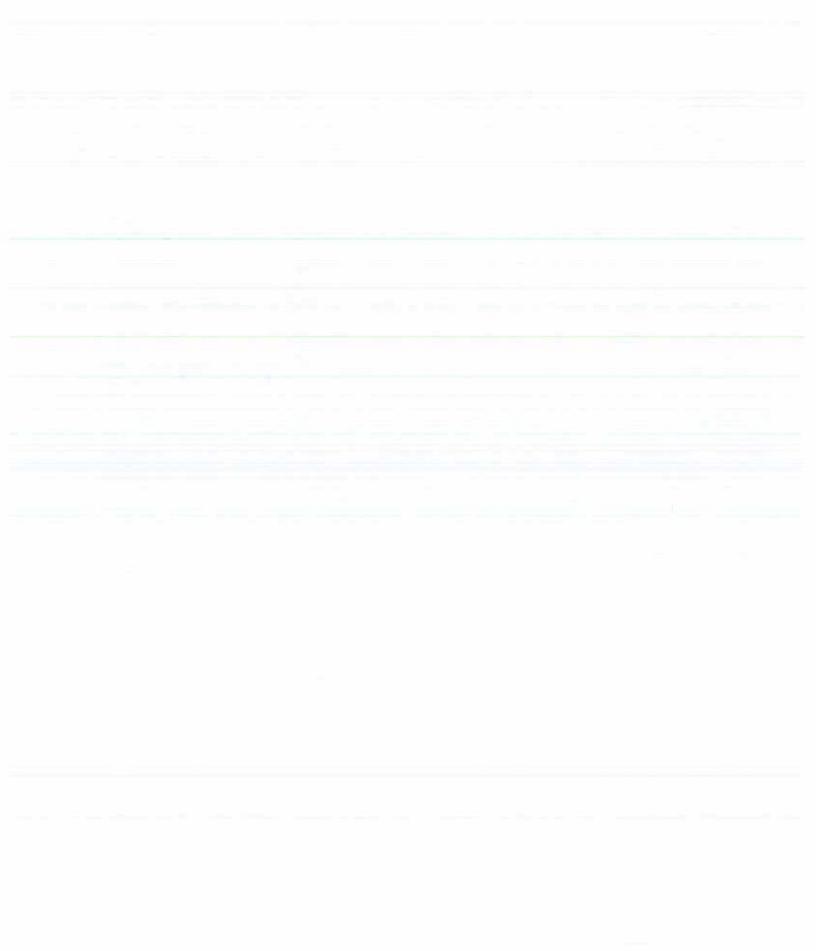
Evaluation ratings provided for all performance indicators within each performance criteria will be combined by each member of the merit committee to reach a component rating for each of the relevant performance criteria (Teaching/Librarian Effectiveness, Research/Creative Work, and Service). Merit committee 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 is unacceptable, 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.

Teaching/Librarian Effectiveness

Teaching/Librarian Effectiveness assignment for calendar year: _____

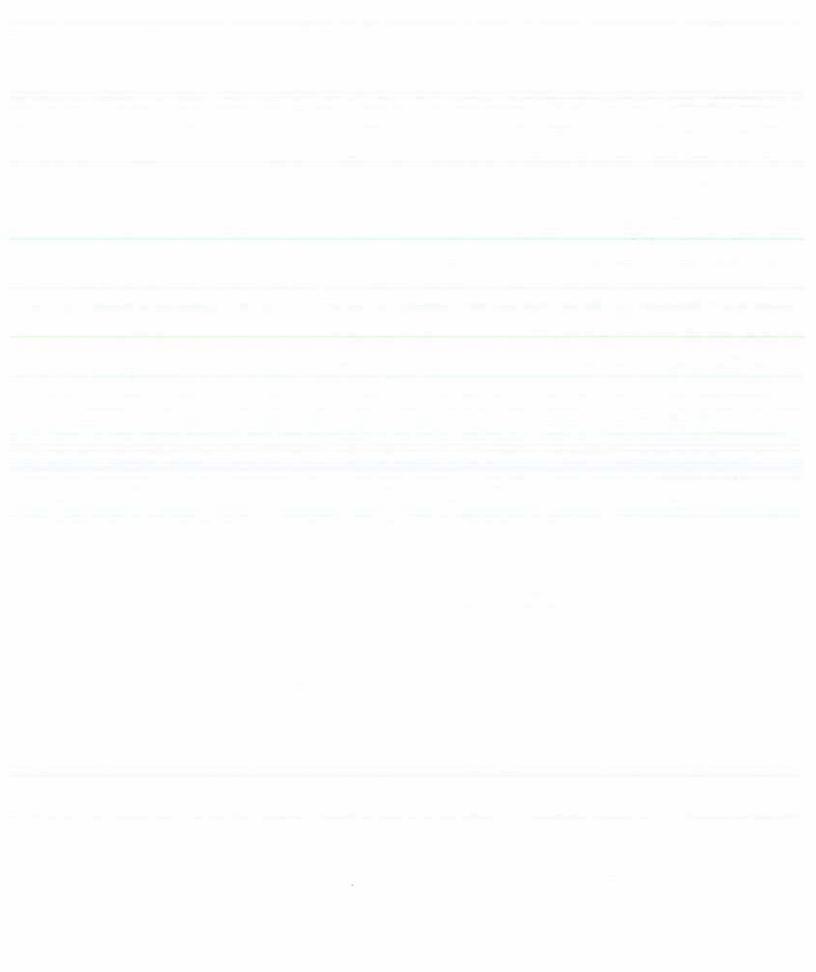Pre-specified allocation of effort for Teaching/Librarian Effectiveness: ___ %

Performance Indicators (description)	Evaluation Rating (Circle One)	Basis of the Evaluation Rating (evidence, accomplishment, etc.)

Assessment of Teaching:
 1. Notable reorganization change (include old and new syllabus with explanation of change)
 2. Writing/revising lab manuals
 3. Adopting a new textbook
 4. Preparing new handouts
 Content New to Instructor
 5. Course new to individual including new topic to general topics course (describe course, benefit of course to college, work required to create course).
 6. New content
    a) New modules/chapters added to course material
    b) New ways of testing
    c) New teaching technology for a course
	Excellent 5 (submitted 5 high quality assessments of teaching)
	 Very Good 4 (submitted 4 high quality assessments of teaching)
	 Good 3 (submitted 3 high quality assessments of teaching)
	 Fair 2 (submitted 2 high quality assessments of teaching)
	 Poor 1 (submitted 1 high quality assessment of teaching)
	 N/A (no assessments submitted)	

New Strategies
7. Based on analysis
    a) Case studies
    b) Current events
    c) External research
    d) Research findings
    e) External services to
       textbook – online tools.
    f) Student projects
8. Other
Curriculum Development and Enhancement
9. Modify existing course (major) – content or method of instruction
10. Approval of a new Associate Degree Program
11. Approval of a new specialization for an associate degree program
12. Web projects
13. Syllabus for each course
14. Other
Peer Evaluations: 2 per year, Include copies of evaluations.
Student Evaluations of Teaching List each course and the median for the course.		

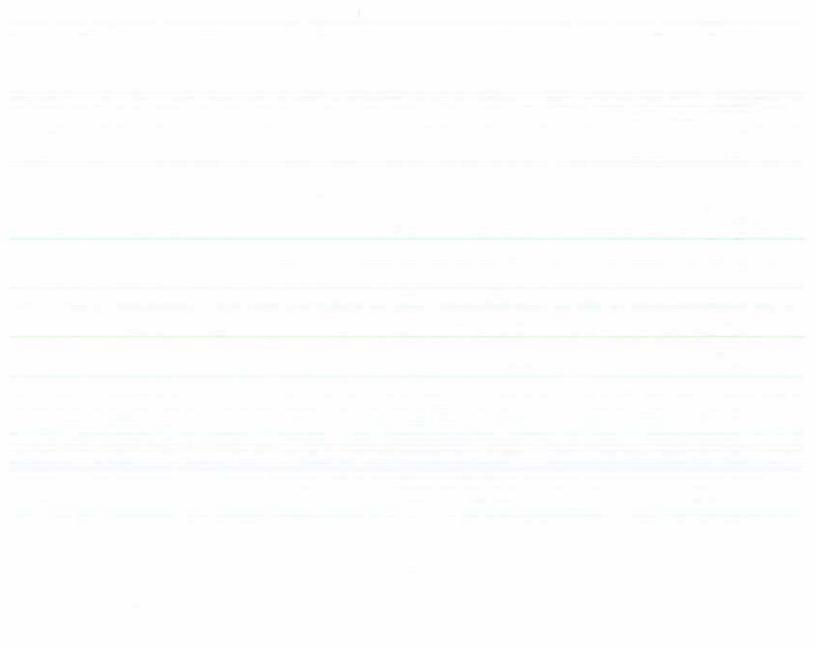| Merit Score (point allocation)	Definition and Description
Exceeds Expectations for Merit in Teaching/Librarian Effectiveness 4-5 points	**Exceeds Expectations for Merit in Teaching/Librarian Effectiveness**
Meets Expectations for Merit in Teaching/Librarian Effectiveness 3-3.9 points	**Meets Expectations for Merit in Teaching/Librarian Effectiveness**
Fails to Meet Expectations for Merit in Teaching/Librarian Effectiveness 2-2.9 points	Fails to meet Expectations for Merit in Teaching/Librarian Effectiveness
Unacceptable Performance in Teaching/Librarian Effectiveness 1.9 points or less	Unacceptable Performance in Teaching/Librarian Effectiveness

Merit Score for Teaching/Librarian Effectiveness
(To be completed by merit committee member): _____

Research/Creative Work

Pre-specified allocation of effort for Research/Creative Work: ___ %

Performance Indicators (description)	Evaluation Rating (Circle One)	Basis of the Evaluation Rating (Evidence, accomplishment, etc.)

Assessment of Research/Creative Work:
1. Conference Presentation, Workshop Leader or Panel Participant (explain your role, include evidence of participation) (Invited presenter/leader add 1-3 points.)
2. Professional Development Activities
  a) To keep abreast of the field, such as webinars, conducting workshops
  b) Participation in learning community.
  c) Conference attendance
  d) Continuing education for licensure (list)
3. Publications
  a) Peer Reviewed journal articles
    1. National
    2. Regional/state
  b) Invited journal or book chapter.
  c) Non-peer reviewed journal or book chapter.
  d) Book publication:
    1. Book contract
    2. Completed Chapters
    3. Publication
  e) Reviews of books, films, plays, record, etc.
  f) White papers and other publications.
4. Professional/Nonprofessional Journal
  a) Editor
  b) Peer reviewer
5. Web Projects
  a) (including web developer for organization)
  b) Include intended audience (NOT potential audience), degree of involvement in technical production, design and organization, and content decisions.
	Excellent 5 (submitted 5 high quality assessments of research/ creative work)
	Very Good 4 (submitted 4 high quality assessments of research/ creative work)
	Good 3 (submitted 3 high quality assessments of research/ creative work)
	Fair 2 (submitted 2 high quality assessments of research/ creative work)
	Poor 1 (submitted 1 high quality assessment of research/ creative work)
	N/A (no assessments submitted)	

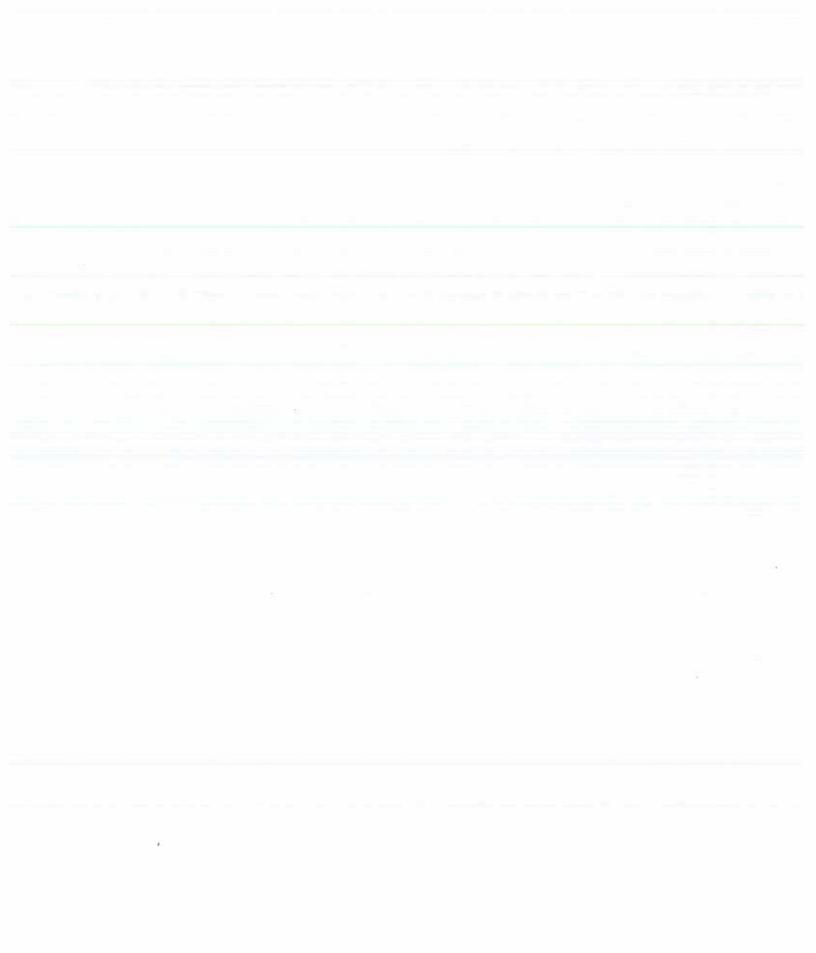|		

6. Awards in Exhibitions
(Include description of work.)
    a)   Local
    b)   Regional
    c)   National
    d)   International
7. Representation in a Gallery
(Include description of work.)
    a)   Local
    b)   Regional or National
    c)   International
8. Post-Degree Work and
Supplemental Education
   (List academic coursework.)
9. Research Projects/Grants
Received
(Describe research project, source
and amount of funding.)
    a)   Internal
    b)   External
    c)   Internal/External in
         partnership with outside
         agencies (community
         groups, schools, etc.)
10. Honor or Awards
(List name, sponsor and rationale.)
11. Other (List)		

Merit Score (point allocation)	Definition and Description
Exceeds Expectations for Merit in Research/Creative Work **4-5 points**	**Exceeds Expectations for Merit in Research/Creative Work**
Meets Expectations for Merit in Research/Creative Work **3-3.9 points**	**Meets Expectations for Merit in Research/Creative Work**
Fails to Meet Expectations for Merit in Research/Creative Work **2-2.9 points**	**Fails to meet Expectations for Merit in Research/Creative Work**
Unacceptable Performance in Research/Creative Work **1.9 points or less**	**Unacceptable Performance in Research/Creative Work**

Merit Score for Research/Creative Work
(To be completed by merit committee member): ___

Service

Pre-Specified Allocation of Effort for Service ___ %

Performance Indicators (description)	Evaluation Rating (Circle One)	Basis of the Evaluation Rating (Evidence, accomplishment, etc.)

Assessment of Service: **1. University/Main Campus Committees** (indicate semester served)
  a) Membership
  b) Chair or secretary of any committee
  c) Senate executive committee
2.College (indicate semester served)
  a) Membership
  b) Chair or Secretary
3.Department (indicate semester served)
  a) Membership
  b) Chair or Secretary
  c) Department Secretary
  d) Mentoring part time faculty
4.Professional Service* (describe work involved)
  a) Special recruitment work
  b) Administrative reports
  c) President/Vice President/Treasurer of organization
5.Community Service or Engagement# (Identify organization and work involved)
  a) Member of Board of Directors
  b) President/Vice President/Treasurer of N/S/R
6.Conducting a Peer review
  a) Internal/external)
7.Other:
	Excellent 5 (submitted 5 high quality assessments of service)
	Very Good 4 (submitted 4 high quality assessments of service)
	Good 3 (submitted 3 high quality assessments of service)
	Fair 2 (submitted 2 high quality assessments of service)
	Poor 1 (submitted 1 high quality assessment of service)
	N/A (no assessments submitted)	

- *Professional Service** includes such work as holding an office or providing service to a professional organization of which you are a member that directly relates to your profession (such as OATYC or AURCO)
- **#Community Service** includes work that you have chosen to do as a professional in your discipline that represents your commitment to any larger community.

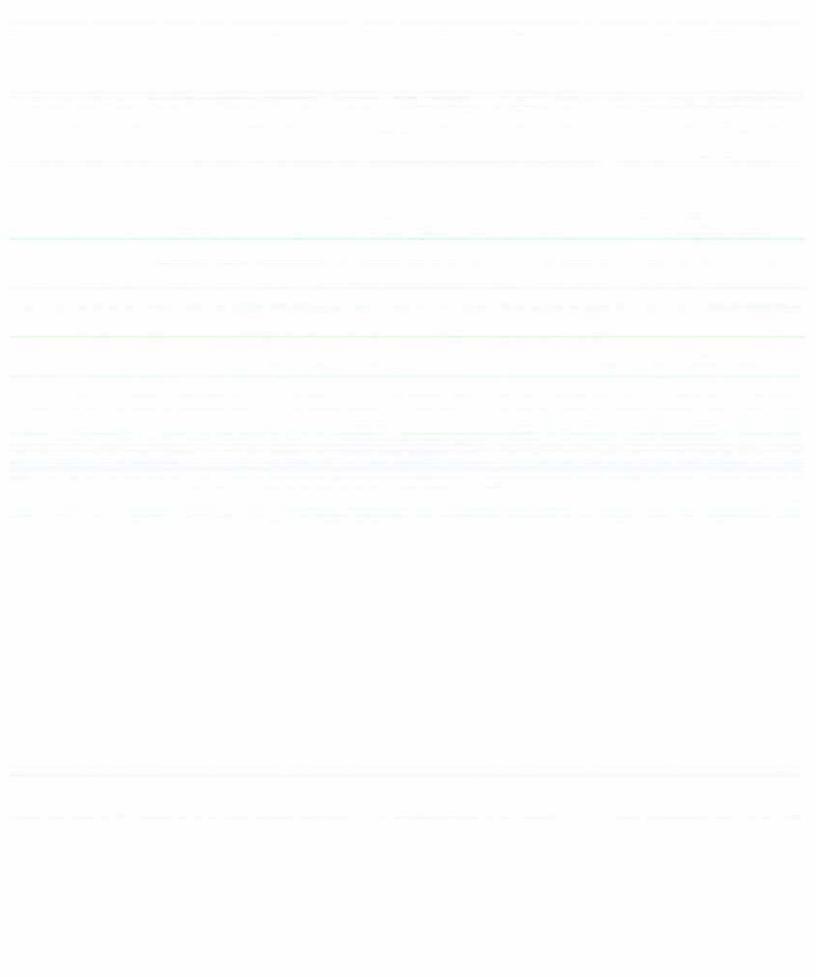| Merit Score (point allocation)	Definition and Description
Exceeds Expectations for Merit in Service **4-5 points**	Exceeds Expectations for Merit in Service
Meets Expectations for Merit in Service **3-3.9 points**	Meets Expectations for Merit in Service
Fails to Meet Expectations for Merit in Service **2-2.9 points**	Fails to meet Expectations for Merit in Service
Unacceptable Performance in Service **1.9 points or less**	Unacceptable Performance in Service

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 Summary	Merit Score for Teaching/ Librarian Effectiveness	Merit Score for Research/ Creative Work	Merit Score for Service
Faculty member Name	*Insert numerical score*	*Insert numerical score*	*Insert numerical score*

Appendix B
Options for Determining Overall Merit Score Recommendations

The individual component merit scores for teaching/librarian effectiveness, research/creative work, and service are combined to arrive at 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, but it must clearly identify whether the overall merit rating reflects performance that is unacceptable, fails to meet expectations, meets expectations, or exceeds

Weighted Allocation of Effort Algorithm

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

Total Merit Calculation: [Teaching/Librarian Effectiveness Merit Score * Allocation of Effort] + [Research/Creative Work Merit Score * Allocation of Effort] + [Service Merit Score * Allocation of Effort] = Overall Merit Score. The table below should be completed to determine the total merit score.

	Raw Score	Contractual Weight	Section Score
Teaching/Librarianship			
Research /Creative Work			
Service			
Total Score			

12/12/2016 – Approved 12/19/2016