

Merit Policy

Part II: Academic Unit Criteria, Standards, and Processes

Academic Unit: Department of Higher Education and Student Affairs

Merit Criteria, Performance Indicators, and Expectations

Eligibility for merit is based on meeting or exceeding unit performance expectations that are assigned to the HESA member on the following performance criteria: teaching, scholarship, and service. Teaching, scholarship, and service are evaluated using a number of performance indicators detailed below in the merit report form.

Department of Higher Education and Student Affairs Merit Report Form

Name

Date

Academic

Year



By putting my initials in the yellow box, I confirm that all the information contained in my dossier is complete and accurate to the best of my knowledge.

TEACHING

| | # | Multiplier | Total | CV Page Number |
|--|---------|------------|---------|-------------------|
| Student Evaluations (Report overall course mean for every class taught.) | | | | |
| <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 Sum of lines 1-6 | | | 0.00 | |
| 8 Number of courses taught | | | 0 | |
| 9 # courses taught X 5 | | | #DIV/0! | |
| 10 Divide Line 8 by Line 9 | | | | |
| 11 Line 10 x 100 (Round to nearest whole number) | | | | Up to 100 |
| Independent Studies Supervised (List names of students and # of credit hours) | | | | |
| 12 Graduate or undergraduate independent study (1 point per credit hour) | # hours | | | Up to 1 |
| 13 Practica supervised (not for paid summer course) | | | | Up to 1 |
| Other Teaching | | | | |
| 14 Guest lecture | | | | Up to 2 |
| Committee Supervision and Membership (Include last name of students) | | | | |
| 15 Dissertation committee chair, dissertation completed | | | | Up to 10 |
| <i>Names:</i> | | | | |
| 16 Master's thesis committee chair, completed | | | | Up to 12 |
| <i>Names:</i> | | | | |
| 17 Dissertation committee member, dissertation completed | | | | Up to 6 |
| <i>Names:</i> | | | | |
| 18 Master's thesis committee member, completed | | | | Up to 6 |
| <i>Names:</i> | | | | |
| 19 Dissertation committee chair, proposal approved | | | | Up to 6 |
| <i>Names:</i> | | | | |
| 20 Dissertation committee member, proposal approved | | | | Up to 4 |
| <i>Names:</i> | | | | |
| 21 Preliminary examination committee chair, completed | | | | Up to 6 |
| <i>Names:</i> | | | | |
| 22 Preliminary examination committee member, completed | | | | Up to 4 |
| <i>Names:</i> | | | | |

Curriculum Development (Identify course)

23 Course proposal (green sheet submitted)

24 *Extensive course modification

Attach documentation for extensive course modifications.

| | | | |
|--|---------|--|--|
| | Up to 5 | | |
| | Up to 5 | | |

Professional Development

25 Attend formal workshop or seminar intended to develop teaching talent (e.g., CTLT or conference session)

List here:

| | | | |
|--|---------|--|--|
| | Up to 3 | | |
|--|---------|--|--|

Graduate Department Advising

26 Up to one point per advisee

List names or attach 6890 rosters:

| | | | |
|--|---------|--|--|
| | Up to 1 | | |
|--|---------|--|--|

Peer and Self Evaluations

27 *Conduct a peer review of teaching and provide feedback letter

28 *Be reviewed by a peer and receive feedback letter (submit)

29 *Conduct self-assessment of teaching and student evaluations (submit)

Attach review letters and self-assessment (Items 25-27)

| | | | |
|--|---------|--|--|
| | Up to 3 | | |
| | Up to 3 | | |
| | Up to 2 | | |

Teaching Awards (Identify award)

30 Special award/citation (college- or university-wide award)

31 Special award/citation (professional association; must be competitive)

| | | | |
|--|----------|--|--|
| | Up to 15 | | |
| | Up to 20 | | |

Other Teaching Activities

32 List any other activities that you consider teaching. Include a short description and the number of points you consider each to be worth.

| | | | |
|--|--|--|--|
| | | | |
| | | | |
| | | | |

Total Points for Teaching Activities

0

RESEARCH AND SCHOLARLY ACTIVITY

Professional Conferences or Workshops Attended

33 National, regional, or state

34 Local (3 hours minimum duration)

35 Local colloquium (five points maximum)

| | | | |
|--|---------|--|--|
| | Up to 3 | | |
| | Up to 1 | | |
| | Up to 1 | | |

Competitive Grants Received (External grants or competitive BGSU (e.g., Partnerships for Community Action))

36 Less than \$10,000

37 \$10,000 - \$100,000

38 More than \$100,000

| | | | |
|--|----------|--|--|
| | Up to 10 | | |
| | Up to 25 | | |
| | Up to 50 | | |

Competitive Grants Submitted, but Not Funded

39 External grants less than \$10,000

40 External grants \$10,000 - \$100,000

41 External grants more than \$100,000

| | | | |
|--|----------|--|--|
| | Up to 3 | | |
| | Up to 5 | | |
| | Up to 10 | | |

Authored Publication (See service section for editorial activities)

42 Professional book (e.g., textbook, scholarly book, monograph)

43 Professional book co-author (e.g., textbook, scholarly book, monograph)

44 New edition of professional book (e.g., textbook, scholarly book, monograph)

45 Professional book chapter (e.g., textbook, scholarly book, monograph)

46 Professional book chapter co-author (e.g., textbook, scholarly book, monograph)

47 Professional book chapter submitted

48 Professional book editor (conceived idea, submitted it, got chapter authors)

49 Refereed journal article

50 Refereed journal article submitted for review

51 Article reprinted or abstracted: previously published

52 Non-refereed journal article (also ERIC)

53 Media/book review

| | | | |
|--|-----------|--|--|
| | Up to 150 | | |
| | Up to 100 | | |
| | Up to 50 | | |
| | Up to 35 | | |
| | Up to 30 | | |
| | Up to 5 | | |
| | Up to 30 | | |
| | Up to 50 | | |
| | Up to 5 | | |
| | Up to 5 | | |
| | Up to 20 | | |
| | Up to 10 | | |

Non-Journal Publications

- 54 Newspaper/newsletter feature article
- 55 Letter to editor (in professional journal)
- 56 Conference proceedings (entire paper)

| | | | |
|--|---------|--|--|
| | Up to 5 | | |
| | Up to 2 | | |
| | Up to 5 | | |

Professional Conference Papers and Presentations (formal paper or workshop presentation)

- 57 National or international (based on conference location)
- 58 Regional, state, or local (based on conference location)
- 59 BGSU (include RD Poster Session and Brown Bag Paper)

| | | | |
|--|----------|--|--|
| | Up to 15 | | |
| | Up to 10 | | |
| | Up to 5 | | |

Professional Conference Panel Member, Discussant, or Chair

- 60 International panel member or discussant (NEW)
- 61 National panel member or discussant
- 62 Regional or state panel member or discussant
- 63 Local panel member or discussant

| | | | |
|--|---------|--|--|
| | Up to 8 | | |
| | Up to 6 | | |
| | Up to 4 | | |
| | Up to 2 | | |

- 64 Conference session chair

| | | | |
|--|---------|--|--|
| | Up to 1 | | |
|--|---------|--|--|

Research/Scholarship/Fellowship/Special Award

- 65 In-house, school or department competition
- 66 College-wide competition
- 67 University or broader based competition

| | | | |
|--|----------|--|--|
| | Up to 5 | | |
| | Up to 10 | | |
| | Up to 15 | | |

Other Scholarly Activities

- 68 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.

| | | | |
|--|--|--|--|
| | | | |
| | | | |
| | | | |

Total Points for Research and Scholarly Activity

0

SERVICE

Annual Editorial Activities (Editing and/or reviewing the work of others)

- 69 Professional book editor (e.g., textbook, scholarly book, monograph)
- 70 Professional book co-editor (e.g., textbook, scholarly book, monograph)
- 71 National journal editor (per issue)
- 72 Regional or state journal editor (per issue)
- 73 Newsletter editor (per issue)
- 74 Book manuscript reviewer for publisher (entire book)
- 75 Book manuscript reviewer (prospectus or partial book)
- 76 Manuscript editorial board reviewer for journal (per article)
- 77 Professional conference proposal reviewer (per conference)
- 78 Grant proposal reviewer

| | | | |
|--|----------|--|--|
| | Up to 20 | | |
| | Up to 15 | | |
| | Up to 20 | | |
| | Up to 15 | | |
| | Up to 5 | | |
| | Up to 10 | | |
| | Up to 5 | | |
| | Up to 2 | | |
| | Up to 2 | | |
| | Up to 3 | | |

Consultantships and Speaking Engagements

- 79 Consulting, one time formal arrangement
- 80 Speaker for local organizations

| | | | |
|--|---------|--|--|
| | Up to 3 | | |
| | Up to 2 | | |

Committee Service and Student Group Advising

- 81 Department, college, university committee chair
- 82 Department, college, university committee member
- 83 Elected national professional association president or chair
- 84 Elected national professional association officer
- 85 Elected regional/state/local association president or chair
- 86 Elected regional/state/local association officer
- 87 Professional association committee chair
- 88 Professional association committee member
- 89 Advisor for a student organization

| | | | |
|--|----------|--|--|
| | Up to 6 | | |
| | Up to 4 | | |
| | Up to 15 | | |
| | Up to 8 | | |
| | Up to 10 | | |
| | Up to 6 | | |
| | Up to 7 | | |
| | Up to 5 | | |
| | Up to 1 | | |

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.

Service Awards

- 90 Special award/citation (local, department)
- 91 Special award/citation (college, regional)

| | | | |
|--|----------|--|--|
| | Up to 5 | | |
| | Up to 10 | | |

Other Service Activities

92 List any other activities that you consider service. Include a short description and the number of points you consider each to be worth.

| | | | |
|--|--|--|--|
| | | | |
| | | | |

Total Points for Service Activity 0

Academic Year Summary of Points

| | Raw Scores | Insert Allocation of Effort | Total |
|---------------------------|------------|-----------------------------------|--|
| Teaching | 0 | 40% | 0 |
| Research/Scholarship | 0 | 40% | 0 |
| Service | 0 | 20% | 0 |
| Total Merit Points | | | 0 |

*Adjust allocation of effort if you have had an alternate allocation approved

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.

Merit committee members will provide an evaluation rating for all performance indicators within each performance criteria (teaching, scholarship, service) and tally these ratings to reach a component rating (0-5) for each of the relevant performance criteria (teaching, scholarship, and service). Merit committee members will then meet to review and reach consensus on component ratings for each of the relevant performance criteria, using the Merit Rating Form below. The component ratings must clearly identify whether the component reflects performance that is unacceptable, fails to meet expectations, meets expectations, or exceeds expectations for merit.

Merit Rating Form

| Merit Rating | Merit Score | Teaching Points | Scholarship Points | Service Points |
|--|-------------|---|--|---|
| Exceeds Expectations for Merit | 5 | 170 or more | 200 or more | 100 or more |
| Exceeds Expectations for Merit | 4 | 140-169 | 150-199 | 75-99 |
| Meets Expectations for Merit | 3 | 110-139 | 100-149 | 50-74 |
| Meets Expectations for Merit | 2 | 80-109 | 50-99 | 25-49 |
| Fails to Meet Expectations for Merit | 1 | 0-79 | 0-49 | 0-24 |
| Unacceptable | 0 | Overall mean on student course evaluations <3.0, clear theme of specific problems identified in student course evaluations or peer evaluations of teaching, and no involvement in any instructional development efforts or opportunities OR no materials submitted for review | No evidence of active research agenda or productivity (e.g., refereed manuscripts, scholarly chapters, or books under review; no submissions of refereed conference papers) OR no materials submitted for review | Repeated absences from participation in and contributions to department committees and/or department faculty meetings; lack of participation in any non-committee service opportunities (e.g., recruitment and admission activities, commencement) OR no materials submitted for review |
| Merit Score 0-5 (to be completed by merit committee member) | | | | |

Merit Committee Composition and the Election//Appointment Process

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 merit report form 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. The committee may adjust the number of points requested by faculty for their activities. The committee will reach consensus on the final merit rating.

Elements of the Merit Dossier

The submitted merit dossier must include the following elements

- HESA merit report form. Faculty will request points for activities in teaching, scholarship, and service.
- Curriculum vitae in BGSU format with achievements of the previous merit review period 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.
[Note: Beginning Fall 2017, the merit review period will be the prior Fall, Spring, Summer academic year.]
- The course evaluation report for each class during the merit period.

- 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.)

Calculation of Overall Merit Score

For each faculty member under review, the merit committee completes the Individual Merit Summary Form (below). On this form, the committee members will enter the points earned for teaching, scholarship, and service as determined on the merit report form. They will then enter the merit score (0-5) based on the Merit Rating Form (above). Next the allocation of effort is entered. Unless the chair has approved an alternate allocation, HESA faculty have the following workload allocation: 40% teaching, 40% research/scholarship, 20% service. The merit score is multiplied by the allocation of effort to record the adjusted merit score for teaching, scholarship, and service. The sum of those three numbers yields the adjusted merit score.

On the Determination of Overall Merit Score Recommendation chart below, the adjusted merit score equates to an overall merit score of 0-5, based on the adjusted merit score and clearly identifies whether the overall merit rating reflects performance that is unacceptable, fails to meet expectations, meets expectations, or exceeds expectations for merit.

The recommendations of the merit committee shall be forwarded to the dean along with the chair's recommendations. The dean makes the final determine of merit.

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

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

Determination of Overall Merit Score Recommendation

| Overall Merit Score | Calculation | Interpretation |
|---------------------|---------------------------------|--|
| 0 | Unacceptable | Unacceptable in teaching, scholarship, or service as defined above |
| 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 | |

DEPARTMENT SUMMARY FORM

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

| Faculty Member | Merit Score for Teaching | Merit Score for Scholarship | Merit Score for Service | Adjusted Merit Score | Final Recommendation |
|------------------|--------------------------|-----------------------------|-------------------------|----------------------|--|
| Faculty member 1 | Insert numerical score | Insert numerical score | Insert numerical score | | <input type="checkbox"/> Unacceptable <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 |
| Faculty member 2 | Insert numerical score | Insert numerical score | Insert numerical score | | <input type="checkbox"/> Unacceptable <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 |
| Faculty Member 3 | Insert numerical score | Insert numerical score | Insert numerical score | | <input type="checkbox"/> Unacceptable <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 |
| Faculty Member 4 | Insert numerical score | Insert numerical score | Insert numerical score | | <input type="checkbox"/> Unacceptable <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 |
| Faculty Member 5 | Insert numerical score | Insert numerical score | Insert numerical score | | <input type="checkbox"/> Unacceptable <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 |

Additional Academic Unit Merit Policy Information

Three-year Rolling Average: The three-year rolling average for merit will be determined by calculating the average of the adjusted merit score for the current plus two prior years. This average will be correlated to the appropriate merit score as detailed on the Determination of Overall Merit Score Recommendation table above.

Exceeds Merit Pool: The exceeds merit pool shall be distributed based on the percentage of total points earned by all faculty exceeding expectations for merit (i.e., those earning a 4 or 5 merit score), based on a three-year rolling average. The total weighted points for teaching, scholarship, and service for the current and two prior years shall be averaged to calculate the weighted total merit points for the three-year rolling average. The total number of points in the exceeds merit pool is the sum of weighted total merit points for faculty members exceeding merit. Faculty shall be recommended for a merit increase, equivalent to their share of the exceeds merit pool.

For example, 4 faculty members have achieved a merit score of 4 or 5. Their weighted total merit points are totaled (e.g., 140 + 160 + 300 + 400 = 1000) and the exceeds merit dollars are allocated based on the percent of the points earned by those four faculty (e.g., 14%, 16%, 30%, 40%).

Approved by the Department of Higher Education and Student Affairs at the Month, Date, Year
Faculty Meeting

Maureen E. Wilson
Maureen E. Wilson, Chair

Date 02/02/2017

Approved: Dawn M. Shinew
Dawn M. Shinew, Dean of College of Education and Human Development

Date 3/15/17

Approved: Rodney Rogers
Rodney Rogers, Provost/Senior VP

Date 3/15/17