

Merit Document
School of Educational Foundations, Leadership, and Policy¹

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 in the following areas: Teaching, 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 = Does not meet expectations for merit; 2/3 = Meets expectations for merit; 4/5 = Exceeds expectations for merit.

Both the merit committee of the academic unit and the 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, Research/Creative Work, and Service), performance indicators and expectations for the criteria, and the calculation of the component merit scores (i.e., Teaching, Research/Creative Work, and Service) are contained in Appendix A.

¹ Based on a template agreed upon in a Memorandum of Understanding (MOU) by Bowling Green State University and the Bowling Green State University Faculty Association, December 15, 2014. Through a vote pursuant to Article 17, sec. 11.2.1, of the CBA, and following the December 15, 2014, MOU, the faculty in EFLP have adopted a Merit Document that follows **Exemplar 3** for Criteria, Performance Indicators, and Expectations, and **Exemplar C** for the Determination of Overall Merit Score Recommendations. See Appendices A and B, respectively.

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 director.
- 2.2. The school merit committee is responsible for assigning an overall merit score to every bargaining unit faculty member.
 - 2.2.1. Per Section 7.1 of the School of Educational Foundations, Leadership, and Policy Charter ("the School Charter"), the School's Personnel Committee shall constitute the Merit Committee. See Section 7.1.2.1 of the School Charter.
 - 2.2.2. The Committee shall consist of five members with one representative from each of the four programs and one at-large elected from within the school faculty. Committee representatives shall be elected by the members of that Program. Care is to be taken to ensure representation from both tenured and probationary faculty. Members will serve on the School Personnel Committee on a three-year basis, with staggered terms. To allow for staggered terms, the initial membership will include one member to serve one year, two members to serve two years, and two members to serve three years, to be determined by the committee members at their initial meeting. Thereafter, members shall be elected by the faculty of the respective units to three-year terms. The committee chair shall be elected by majority vote of committee members on an annual basis. (See section 7.1.1 of the School Charter.)
- 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. Process for Submitting Merit Portfolios and Determining Recommended Merit Scores
 - 2.4.1. Each faculty member shall submit a merit portfolio on or before the stated due date in section 3 below.
 - 2.4.2. In the merit portfolio, each faculty member will complete a Merit Rubric (Appendix A), documenting and proposing the performance indicators the faculty member has met during the merit year.
 - 2.4.3. For each area (teaching, research/scholarship, and service), the faculty member will propose a "Possible Merit Score", resulting in "Exceeds Expectations", "Meets Expectations", or "Fails to Meet Expectations".
 - 2.4.4. The Personnel Committee will then review the faculty member's proposed merit score for each area (teaching, research/scholarship, and service), make any amendments the Committee deems necessary, and complete the Merit Rubric by entering the Committee's recommended score.
 - 2.4.5. The Committee then determines an overall recommended merit score using the Weighted Allocation of Effort Algorithm in Appendix B.
 - 2.4.6. The Personnel Committee will then complete a Summary Form (Appendix A) for each faculty member, and submit the Form, with recommended merit score, to the faculty member and the school director. Per the schedule in section 3 below, each faculty member will have an opportunity to appeal the Committee's recommendation to the school director.

- 2.4.7. The school director then reviews the faculty member's portfolio, proposed scores, and Committee's recommendation, and submits a recommendation to the Dean. Per the schedule in section 3 below, each faculty member will have an opportunity to appeal the school director's recommendation to the Dean.
- 2.4.8. The portfolio must include the elements outlined in Appendix C.
- 2.5. 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 director.

February 28: Academic unit faculty 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 in 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.

Approved, as amended, by the School of Educational Foundations, Leadership, and Policy on February 11, 2015.

Patrick Pauken Date 3/5/15
Patrick Pauken, Director

Approved: Brad Colwell, Dean Date 3/13/15
Bradley Colwell, Dean
College of Education and Human Development

Approved: Rodney Rogers Date 3/23/15
Rodney Rogers, Provost/Senior VP

APPENDIX A

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

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

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, 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 all documents – narratives and artifacts – submitted by each faculty member to determine that merit level for each criteria using an anchored rating scale anchored with examples of expected levels (or their equivalent) of performance on the performance indicators. Merit committee members will meet as a committee to review and reach consensus on component elements 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) 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.

Meets expectations for merit: Activities in area cumulatively meet expectations and reflect standard levels of performance for the school.

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.

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.

| Evaluation Rating Category | TEACHING Expected levels of accomplishment on teaching performance indicators (or their equivalent) | Possible Merit Score for Teaching |
|--|---|-----------------------------------|
| <p>Exceeds Expectation</p> <p>NOTE: To qualify for this category you must exceed 3.6 scaled points and MUST have a minimum of 2 points from the Evaluations category. Additionally, the maximum number of points is 5</p> | <p><i>Evaluations</i></p> <ul style="list-style-type: none"> • 66% of quantitative teaching evaluations average 4.0+ (1.5 pts) OR • 66% of quantitative teaching evaluations average 3.5+ (1 pts) • Positive qualitative evaluations from same 66% of teaching (1 pt) • Positive peer observation (1.5 pt) <p><i>Curriculum/Instruction</i></p> <ul style="list-style-type: none"> • Implemented innovative instructional techniques (1 pt) • Refinement and modification of existing course (0.5 pt) • Successful creation of a new course (1 pt) <p><i>Advising</i></p> <ul style="list-style-type: none"> • Student Advising (1 pt) • Chaired completed dissertation/thesis (1 pt) • Member completed dissertation/thesis (0.5 pt) • Chaired preliminary exam/Masters projects (0.25) <p><i>Other</i></p> <ul style="list-style-type: none"> • Uncompensated teaching overload (e.g. Ind. Study, directed research/readings) (1 pt) • Professional development activity to improve instruction (0.5 pt) • _____ (justify inclusion and proposed pts) <p>TOTAL FROM ABOVE _____ X 0.7 = _____</p> | 3.6-5.0 |
| <p>Meets Expectation</p> <p>NOTE: To qualify for this level you MUST have a minimum of 1.5 points in the Evaluations category.</p> <p>The maximum score in for this level is 3.5 regardless of total point accumulated</p> | <p><i>Evaluations</i></p> <ul style="list-style-type: none"> • 66% of quantitative teaching evaluations average 4.0+ (1.5 pts) OR • 66% of quantitative teaching evaluations average 3.5+ (1 pts) • Positive qualitative evaluations from 66% of teaching (1 pt) • Positive peer observation (1.5 pt) <p><i>Curriculum/Instruction</i></p> <ul style="list-style-type: none"> • Implemented innovative instructional techniques (1 pt) • Refinement and modification of existing course (0.5 pt) • Successful creation of a new course (1 pt) <p><i>Advising</i></p> <ul style="list-style-type: none"> • Student Advising (1 pt) • Chaired completed dissertation/thesis (1 pt) • Member completed dissertation/thesis (0.5 pt) • Chaired preliminary exam/Masters projects (0.25) <p><i>Other</i></p> <ul style="list-style-type: none"> • Uncompensated teaching overload (e.g. Ind. Study, directed research/readings) (1 pt) • Professional development activity to improve instruction (0.5 pt) • _____ (justify inclusion and proposed pts) <p>TOTAL FROM ABOVE _____ X 0.7 = _____</p> | 1.6-3.5 |
| <p>Fails to meet Expectation</p> | <p><i>Evaluations</i></p> <ul style="list-style-type: none"> • 66% of quantitative teaching evaluations average 3.0+ (0.5 pts) • Letter from program chair indicting average teaching performance (1 pt) | 0.0-1.5 |

| 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> | Possible Merit Score for Teaching |
|----------------------------|---|-----------------------------------|
| | <ul style="list-style-type: none"> • Peer observation deemed adequate (0.5 pt) • _____ (justify inclusion and proposed pts) <p>TOTAL FROM ABOVE _____ X 0.7 = _____</p> | |

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

| Evaluation Rating Category | <p style="text-align: center;">RESEARCH/SCHOLARSHIP WORK</p> <p style="text-align: center;">Expected levels of accomplishment on teaching performance indicators (or their equivalent)</p> | Possible Merit Score for Research |
|--|---|-----------------------------------|
| <p>Exceeds Expectation</p> <p>NOTE: Maximum score of 5.0 for this level</p> <p>NOTE: Must have at least one item from the Authorship (scholarly) category to qualify for this level of merit</p> | <p><i>Authorship (scholarly)</i></p> <ul style="list-style-type: none"> • 1st edition of a published book (4.5 pt) • Revision of previously published book (2 pt) • Published refereed/juried/peer reviewed article (2.25 pt) • Book chapter Peer Reviewed (2.25 pt) • Book chapter Non-peer reviewed (1.5 pt) • Editor of scholarly publication (book or peer reviewed journal) (2 pt) • Associate editor of peer reviewed journal (1 pt) <p><i>Funding</i></p> <ul style="list-style-type: none"> • P.I or Co-P.I on Externally funded (2 pt) or unfunded (1 pt) grant \geq \$100,000 • P.I or Co-P.I on Externally funded (1 pt) or unfunded (0.5 pt) grant $<$ \$100,000 • P.I or Co-P.I on Internally funded (0.5 pt) or unfunded (0.25 pt) grant <p><i>Presentations (max 1.5 pt)</i></p> <ul style="list-style-type: none"> • Regional, national, or international presentation and/or paper (0.5 pt) • Local or state presentation/paper (0.25 pt) <p><i>Authorship (other)</i></p> <ul style="list-style-type: none"> • Book review (0.5 pt) • Published non-refereed/non-juried/non-peer reviewed/invited article (0.5 pt) <p>OTHER</p> <ul style="list-style-type: none"> • Professional development activity to improve research/scholarship (0.5 pt) • _____ (justify inclusion and proposed pts) <p>TOTAL FROM ABOVE _____ X 0.7 = _____</p> | 3.6-5.0 |
| <p>Meets Expectation</p> <p>NOTE: Must have at least one item from the Authorship (scholarly) category to qualify for this level of merit</p> | <p><i>Authorship (scholarly)</i></p> <ul style="list-style-type: none"> • 1st edition of a published book (4.5 pt) • Revision of previously published book (2 pt) • Published refereed/juried/peer reviewed article (2.25 pt) • Book chapter Peer Reviewed (2.25 pt) • Book chapter Non-peer reviewed (1.5 pt) • Editor of scholarly publication (either book or a peer reviewed journal) (2 pt) • Associate editor of peer reviewed journal (1 pt) <p><i>Funding</i></p> <ul style="list-style-type: none"> • P.I or Co-P.I on Externally funded (2 pt) or unfunded (1 pt) grant \geq \$100,000 • P.I or Co-P.I on Externally funded (1 pt) or unfunded (0.5 pt) grant $<$ \$100,000 • P.I or Co-P.I on Internally funded (0.5 pt) or unfunded (0.25 pt) grant <p><i>Presentations (max 1.5 pt)</i></p> <ul style="list-style-type: none"> • Regional, national, or international presentation and/or paper (0.5 pt) • Local or state presentation/paper (0.25 pt) <p><i>Authorship (other)</i></p> <ul style="list-style-type: none"> • Book review (0.5 pt) • Published non-refereed/non-juried/non-peer reviewed/invited article (0.5 pt) <p>OTHER</p> <ul style="list-style-type: none"> • Professional development activity to improve research/scholarship (0.5 pt) • _____ (justify inclusion and proposed pts) <p>TOTAL FROM ABOVE _____ X 0.7 = _____</p> | 1.6-3.5 |

| Evaluation Rating Category | <p style="text-align: center;">RESEARCH/SCHOLARSHIP WORK</p> <p style="text-align: center;">Expected levels of accomplishment on teaching performance indicators (or their equivalent)</p> | Possible Merit Score for Research |
|---|--|-----------------------------------|
| Fails to meet Expectation NOTE: Maximum score of 1.5 for this level | <p><i>Authorship (scholarly)</i></p> <ul style="list-style-type: none"> • Submitted refereed/juried/peer reviewed article (1 pt) <p><i>Funding</i></p> <ul style="list-style-type: none"> • P.I or Co-P.I on Submitted external grant (1 pt) <p><i>Presentations (max 1.5 pt)</i></p> <ul style="list-style-type: none"> • Regional, national, or International presentation and/or paper (0.5 pt) • Local or state presentation/paper (0.25 pt) <p><i>Authorship (other)</i></p> <ul style="list-style-type: none"> • Book review (0.5 pt) • Published non-refereed/non-juried/non-peer reviewed/invited article (0.5 pt) <p>OTHER</p> <ul style="list-style-type: none"> • Professional development activity to improve research/scholarship (0.5 pt) • _____ (justify inclusion and proposed pts) <p>TOTAL FROM ABOVE _____ X 0.7 = _____</p> | 0.0-1.5 |

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

| Evaluation Rating Category | SERVICE Expected levels of accomplishment on teaching performance indicators (or their equivalent) | Possible Merit Score for Service |
|---|---|----------------------------------|
| <p>Exceeds Expectation</p> <p>NOTE: Maximum score of 5.0 for this level</p> | <p><i>Internal</i></p> <ul style="list-style-type: none"> • Committee Membership (1 pt) • Advisor to student organization (1 pt) • Chair/leadership of committee (2 pt) • Administrative Service (3 pt) <p><i>External</i></p> <ul style="list-style-type: none"> • Committee Membership (1 pt) • Advisor to student organization (1 pt) • Chair/leadership of committee (2 pt) • Officer (State, National) (2 pt) <p><i>Scholarly</i></p> <ul style="list-style-type: none"> • Editorial Review Board (1 pt) • Journal Manuscript review (0.25 -0.5 pt) • Conference proposal review (0.25-0.5 pt) <p><i>Other</i></p> <ul style="list-style-type: none"> • Consultation (1 pt) • _____ (justify inclusion and proposed pts) <p>TOTAL FROM ABOVE _____ X 0.5 = _____</p> | 3.6-5.0 |
| <p>Meets Expectation</p> | <p><i>Internal</i></p> <ul style="list-style-type: none"> • Committee Membership (1 pt) • Advisor to student organization (1 pt) • Chair/leadership of committee (2 pt) • Administrative Service (3 pt) <p><i>External</i></p> <ul style="list-style-type: none"> • Committee Membership (1 pt) • Advisor to student organization (1 pt) • Chair/leadership of committee (2 pt) • Officer (State, National) (2 pt) <p><i>Scholarly</i></p> <ul style="list-style-type: none"> • Editorial Review Board (1 pt) • Journal Manuscript review (0.25 -0.5 pt) • Conference proposal review (0.25-0.5 pt) <p><i>Other</i></p> <ul style="list-style-type: none"> • Consultation (1 pt) • _____ (justify inclusion and proposed pts) <p>TOTAL FROM ABOVE _____ X 0.5 = _____</p> | 1.6-3.5 |
| <p>Fails to meet Expectation</p> | <p><i>Internal</i></p> <ul style="list-style-type: none"> • Committee Membership (1 pt) • Advisor to student organization (1 pt) • Chair/leadership of committee (2 pt) • Administrative Service (3 pt) <p><i>External</i></p> <ul style="list-style-type: none"> • Committee Membership (1 pt) | 0.0-1.5 |

| Evaluation Rating Category | SERVICE Expected levels of accomplishment on teaching performance indicators (or their equivalent) | Possible Merit Score for Service |
|----------------------------|---|----------------------------------|
| | <ul style="list-style-type: none"> • Advisor to student organization (1 pt) • Chair/leadership of committee (2 pt) • Officer (State, National) (2 pt) <p><i>Scholarly</i></p> <ul style="list-style-type: none"> • Editorial Review Board (1 pt) • Journal Manuscript review (0.25 -0.5 pt) • Conference proposal review (0.25-0.5 pt) <p><i>Other</i></p> <ul style="list-style-type: none"> • Consultation (1 pt) • _____ (justify inclusion and proposed pts) <p>TOTAL FROM ABOVE _____ X 0.5 = _____</p> | |

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 | Merit Score for Teaching | Merit Score for Research/ Creative Work | Merit Score for Service |
|----------------------------------|-------------------------------|--|-------------------------------|
| <i>Faculty member 1</i> | <i>Insert numerical score</i> | <i>Insert numerical score</i> | <i>Insert numerical score</i> |
| <i>Faculty member 2</i> | <i>Insert numerical score</i> | <i>Insert numerical score</i> | <i>Insert numerical score</i> |
| <i>Next faculty member, etc.</i> | <i>Insert numerical score</i> | <i>Insert numerical score</i> | <i>Insert numerical score</i> |

APPENDIX B: Determining Overall Merit Score Recommendations

The individual component merit scores for teaching, 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 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.

Weighted Allocation of Effort Algorithm

Once the merit committee has reached consensus on component merit scores on each performance areas (Teaching, 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:

$$[\text{Teaching Merit Score} * \text{Allocation of Effort}] + [\text{Research/Creative Work Merit Score} * \text{Allocation of Effort}] + [\text{Service Merit Score} * \text{Allocation of Effort}] = \text{Overall Merit Score}$$

| Overall Merit Score | Interpretation (assumes component performance ratings made on 5-point scale) |
|---------------------|---|
| 1.0 – 1.5 | Fails to meet basic expectations for merit; Recommendation for no merit |
| 1.6 – 3.5 | Meets basic expectations for merit; Eligible for merit |
| 3.6 – 5.0 | Exceeds expectations for merit; Eligible for merit |

APPENDIX C: EFLP Merit Portfolio Guidelines for 20xx Calendar Year

Structure

You have been given a structured portfolio, which should be followed as you develop your portfolio contents. Merit portfolio organization is as follows:

- A. Merit Summary Sheet (provided by the Personnel Committee) – write in your proposed scores
- B. Merit Rubric with criteria that you have met checked off (after the summary sheet)
- C. Curriculum Vitae in BGSU format. Highlight (electronically or with highlighter) achievements of the year of this portfolio.
- D. Teaching Narrative
 - Table denoting points
 - Artifacts
- E. Scholarship Narrative
 - Table denoting points
 - Artifacts
- F. Service (Narrative needed if not self-explanatory)
 - Table denoting points
 - Artifacts for non-BGSU service

Additional Information for New (First year) Faculty

Although your BGSU contract began in the Fall 20xx, it may be appropriate to include earlier activities for this year.

- Teaching—Include courses Fall 20xx. May include Summer 20xx if taught at BGSU.
- Scholarship—Count all scholarly activity for the 20xx calendar year.
- Service—Include *professional* service for 20xx calendar year; only include BGSU university/school/program service for Fall 20xx.

Additional Information for Tenure-Track Faculty (Assistant and Associate Professors) and Non-Tenure Track Faculty

The merit process is designed to parallel, as much as possible, the Tenure and Promotion process; however, there are some differences which allow more flexibility within the merit process than T&P. Below are some, although not necessarily all, of these differences:

- Teaching -- for merit, only 66% of evaluations are needed for merit but ALL are needed for T&P.
- Teaching -- for merit, peer observation is one of many options to choose from but this is necessary each year for Tenure.

- Scholarship -- for merit, peer-reviewed publication is one of many options to choose from but this is an important component for T&P. Therefore, it is possible for someone to meet or exceed expectations on one or more categories in a merit review every year and still not receive Tenure or Promotion.

Narratives

- Identify the merit level (e.g., Exceeds Expectations, Meets Expectations, Fails to Expectations) that you believe you have achieved this past year in each category and justify proposed merit score by listing the requirements you met for the proposed level.
 - For example:
Scholarship proposed merit level: Exceeds Expectations = merit score 3.675
 - Articulated focus of scholarship
 - 1 published peer reviewed article = 2.25 pts (Artifact 1 = front page of published article)
 - 1 externally funded grant = 2 pts (Artifact 4)
 - 1 national and 1 int'l presentations = 1 pt (Artifact 3 = pages from conference programs)
 - Score = total points from above (5.25) x 0.7 = 3.675
 - In your narrative, introduce, and explain the significance of the evidence that supports the merit level criteria, referring specifically to the included artifacts.
 - If you do not meet specific criteria for a merit level but have compelling evidence of other work not included in the rubric, you may present a case for consideration.
- Although not required to engage in Scholarship of Engagement (SoE), those faculty who choose to be actively involved in SoE should indicate in their narratives the linkages among their scholarship, service and teaching. Products/outcomes of SoE will be evaluated according to the University Standards for SoE and the College of EDHD Guidelines (Report of the Task Force on SoE, BGSU, 2005; SoE Guidelines, College of EDHD, 2006).
- Format
 - Double-space
 - 3 page maximum for each section narrative

See full directions for teaching, scholarship, and service below.

Teaching

See page 1 for narrative directions, plus it should include:

- Table that summarizes scholarship activities and presents the corresponding point values (see Table 1 below)

Table 1: Teaching Activity Example

| Merit Level = _____ | | | |
|--|---|-------------|-------------|
| Teaching Activity 201x | # | Point Value | Total |
| Positive qualitative evaluation | 1 | 1.5 | 1.5 |
| Implemented innovative instructional techniques (explain in narrative) | 1 | 1 | 1 |
| Advising | 1 | 1 | 1 |
| Member completed dissertations /theses | 2 | 0.5 | 1 |
| Professional development | 1 | 0.5 | 0.5 |
| TOTAL POINTS | | | 5.00 |
| Proposed Merit Score = point total x 0.7 | | | 3.5 |

*** Per policy, maximum possible merit score for teaching is 5.0**

Teaching artifacts should be ordered as follows:

1. Teaching Evaluation Summary Table (as presented in Table 2). You will need to summarize teaching evaluation results as well as submit the actual teaching evaluation sheet for at least 66% of your teaching load. State how many courses were taught for the year (including all summer courses or none). Summer courses are optional to include. Summer evaluations may be included in evaluations submitted; however, all summer courses must be considered in the total number of courses taught to do so.) The following ratios of required course evaluations submitted to total number of courses taught is as follows: 2:2, 2:3, 3:4, 4:5, 4:6, 5:7, 6:8, 6:9.
2. Actual quantitative teaching evaluation results sheet for each course submitted in your Teaching Evaluation Summary Table.
3. All qualitative comments for each course submitted in your Teaching Evaluation OR Peer Observation.
- 4 and 5. Other artifacts as needed.
 - If you include course syllabi and materials as artifacts, you need to highlight in some way the parts that demonstrate innovative instructional techniques and/or refinement and modification of existing courses
 - For uncompensated overloads, the artifact may be either the class roster or the grade sheet (with confidential information blacked out).

Table 2: Teaching Evaluation Summary Table

| Total number of coursed taught in 201x: Spring_____ Summer_____ Fall_____ | | | |
|---|-------------------|--------------|------|
| Semester | Course Prefix & # | N (enrolled) | Mean |
| Spring 201x | CSP 6010 | 15 | 4.28 |
| Spring 201x | CSP 6800 | 10 | 4.78 |
| Fall 201x | CSP 6030 | 12 | 4.90 |
| Fall 201x | CSP 6050 | 13 | 3.75 |
| Overall Mean for Courses Submitted | | | 4.42 |

If submitting qualitative comments for one of your teaching artifacts, please submit them in the form received from the Dean's office/School Director.

Research/Scholarship

See page 1 for narrative directions, plus it should include:

- Table that summarizes scholarship activities and presents the corresponding point values (see Table 3 below)

Artifacts should be ordered as follows:

1. Refereed publications
2. Non-refereed professional pieces

Information for both refereed and non-refereed publications:

- Only publications with copyright/publication date of the year of this portfolio can be counted. If copyright is the following year, regardless of when actually published, the publication cannot be included until the copyrighted year.
 - You do not need to include full manuscripts (e.g., the front cover of article or book and first page of article or chapter will suffice).
 - Note if publication is refereed or non-refereed.
 - Submitted pieces may only be considered toward Fails to Meet Expectations.
3. Presentations –
 - Denote international, national, regional, state, local
 - A photocopy of the page(s) with your presentation and the name of the conference from the conference program will suffice for artifact.
 - For presentations at conferences and other venues that the personnel committee might not be knowledgeable of, include a brief explanation for the designation of international, national, regional, state, or local designation.
 4. Grants (May be counted for merit for the life of grant if justified)
 5. Other as needed

Table 3: Research/Scholarship Activity Example

| Merit Level = _____ | | | |
|--|---|-------------|-------------|
| Scholarship Activity 201x | # | Point Value | Total |
| published refereed/juried/peer reviewed article | 2 | 2.25 | 4.50 |
| editor of scholarly publication | 1 | 2 | 2 |
| published non-refereed/non-juried/non-peer reviewed article | 2 | 0.5 | 1 |
| regional, national or international presentations and/or paper | 2 | 0.5 | 1 |
| TOTAL POINTS | | | 8.50 |
| Proposed Merit Score = point total x 0.7 | | | 6.0* |

* Per policy, maximum possible merit score for scholarship is 5.0

Service

This should include a:

- Table that summarizes service activities for program, school, university, and professional levels and presents the corresponding point values (see Table 4 below)
- Brief narrative if table is not self-explanatory.

Artifacts:

- You do not need to include artifacts for BGSU service activities.
- You do need to include artifacts for all non-BGSU service activities (e.g., photocopy list of editorial board from journal).
- Other service artifacts will be few. However, if you have materials that provide evidence of substantive contributions at any level, please include them.
- Service artifacts may be ordered by the individual.

Table 4: Service Activity Example

| Merit Level = _____ | |
|---|-------------|
| Service Activity | Point Value |
| Member, EDHD Elections Committee | 1 |
| Member, EDHD Technology Committee | 1 |
| Member, EDHD Technology Committee | 1 |
| Member, BGSU Digital Media Implementation Task Force | 1 |
| Member, State University Education Dean (SUED) Technology Committee | 1 |
| Chair, School Personnel Committee | 2 |
| Chair, Ohio K-16 Technology Education Policy Committee | 2 |
| Editorial Review Board, <i>Journal of Research on Technology in Education</i> | 1 |
| TOTAL | 10 |
| Proposed Merit Score = point total x 0.5 | 5.0 |

* Per policy, maximum possible merit score for service is 5.0