

Merit Document

Department of German, Russian, and East Asian Languages

Following Merit Template FINAL post-MOU december 15, 2014 - endorsed by BGSU and BGSUFA.docx

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 Department of GREAL in the following areas: Teaching 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 = 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 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 Department of GREAL merit committee is responsible for assigning an overall merit score to every bargaining unit faculty member. The Budget, Salary, and Policy Committee is made up of 3 full-time faculty members elected at the first departmental meeting of the academic year. Replacements during the year shall be elected by the Bargaining Unit faculty members of GREAL.

- 2.3. Faculty members who fail to submit a merit portfolio by the deadline (January 31st or, if a weekend, the next business day) 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: an updated curriculum vitae highlighting activities completed during the previous calendar year and not previously submitted to the committee; a filled-out Performance Update form listing the previous year’s activities with details where necessary (e.g., number of advisees, number of hours, frequency of meetings); and supporting documentation (e.g., student teaching evaluation results, manuscripts or offprints, records of recognitions or achievements).
- 2.5. Once the merit committee has reached consensus on component merit scores in each performance area (Teaching 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:

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

Overall Merit Score	Interpretation (assumes component performance ratings made on 7-point scale)
1.0 – 2.49	Fails to meet basic expectations for merit; recommendation for no merit
2.5 – 5.49	Meets basic expectations for merit; eligible for merit
5.5 – 7.0	Exceeds expectations for merit; eligible for merit

- 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 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.

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 by the Department of GREAL at the



Tim Pogacar, Chair

Date 3/17/15

Approved:



Name, Dean of College Name

Date 2/27/15

Approved:



Rodney Rogers, Provost/ Senior VP

Date 3/11/15

APPENDIX A

Merit Criteria, Performance Indicators and Expectations, and the Calculation of Component Merit Scores (Following Exemplar #3)

Overview

Merit will be based on meeting or exceeding unit performance expectations that are assigned to the department 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 information submitted by each faculty member to assign a numerical score 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 scores for each of the relevant performance criteria using the summary form provided. The component scores may include any range of values, but they must clearly identify whether the assigned score on the criteria (e.g., teaching) 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 department, school, unit, and discipline.

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

Fails to meet expectations for merit: Activities in area cumulatively do not meet expectations and fall below the standard levels of performance for the department, school, unit, and discipline.

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	<p style="text-align: center;">TEACHING EFFECTIVENESS</p> <p style="text-align: center;">Expected levels of accomplishment on teaching performance indicators (or their equivalent)</p>	Possible Merit Score for Teaching*
Exceeds expectations for merit	<p>After meeting expectations for merit outlined below: Quantitative student evaluations regularly exceed departmental averages for similar courses, and qualitative evaluative comments are generally positive or observations by peers indicate highest levels of excellence in the classroom. Evidence provided indicates that innovative teaching practices and high impact learning activities are regularly introduced and evaluated.</p> <p>Further required indicators (a minimum of two): a) Design a new course; teach a new Honors or interdisciplinary course; receive a university teaching award or recognition; propose and teach a one-credit Honors seminar or summer school seminar or BGSU 1910 course; extracurricular, course-related student learning activities; b) initiate or substantially redesign a study abroad program; direct or co-direct a grant-sponsored program; study abroad director; Austria AYA director;</p>	5.5 – 7.0

	<p>c) coordinate revision or review of a portion of a curriculum (e.g., first-year German); qualify a course for the general education pool or another program; complete and present assessment results; submit an external curriculum-related grant proposal; d) serve as an undergraduate major advisor or interdisciplinary program advisor (e.g., International Studies) and fulfill associated expectations; serve as graduate advisor in German and fulfill associated expectations; participate in intensive or lengthy advisor training; e) attend an intensive workshop to improve pedagogical skills (e.g., OPI Tester Training); design a distance learning course; learn another language; participate in MLA-sponsored summer workshop; teach a semester as a Fulbright faculty member; attend an interdisciplinary summer workshop; make a presentation on instruction at a conference; poster session.</p>	
<p>Meets expectations for merit</p>	<p>Quantitative student evaluations approximate departmental averages for similar courses, and qualitative evaluative comments are generally positive. Observations by peers indicate high levels of performance in the classroom. Evidence provided indicates that innovative teaching practices and high impact learning activities are occasionally introduced with some assessment of their impact.</p> <p>Further required indicators: Teach and update assigned number of courses; collect student evaluations; solicit peer evaluations (min. one a year); provide evidence of teaching effectiveness (e.g., student evaluations, peer observations, syllabi, assessment, student achievements);</p> <p>Plus two of the following: a) teach an Honors program course; b) <u>Instructional support</u>: provide instructional support; serve as advisor for a program-related student organization (e.g., an honor society); c) <u>Curriculum</u>: take part in curriculum revision meetings, effect minor changes in the curriculum; take part in assessment efforts in one part of a curriculum; carry out a curriculum related project supported by internal development funds; d) <u>Advising</u>: carry out usual undergraduate and graduate advising (e.g., thesis committee or study abroad or major / minor advising); design and carry out special advising initiatives (e.g., for internships or job placement); participate in an advisor training workshop; e) <u>Professional development</u>: attend a workshop or consult with another faculty member to improve one's pedagogical skills; acquire new skills with pedagogical applications (e.g., learn how to incorporate CAL in a course); attend a workshop indirectly related to improving teaching skills; attend several sessions on teaching at a professional conference; serve as chairman or discussant on a conference panel devoted to instruction.</p>	<p>2.5 – 5.49</p>
<p>Fails to meet expectations for merit</p>	<p>Quantitative student evaluations are among lowest in department for similar courses, and qualitative evaluative comments are mixed. Observations by peers indicate significant opportunities for improvement. Evidence provided indicates that innovative teaching practices and high impact learning activities are generally absent and rarely evaluated. Fails to teach and update assigned number of courses; fails to collect student evaluations; fails to solicit peer evaluations (min. one a year); fails to provide evidence of teaching effectiveness (e.g., student evaluations, peer observations, syllabi, assessment, student</p>	<p>1.0 – 2.49</p>

	achievements). Falls to provide evidence of at least two of the kinds of activities laid out under "Meets expectations for merit" (a-e) above.	
--	--	--

**Insert score values on a scale that includes at least seven numerical values, e.g., 1-7point scale.*

Merit Score for Teaching Effectiveness

(to be completed by merit committee member): _____

Evaluation Rating Category	SCHOLARSHIP/CREATIVE WORK Expected levels of accomplishment on scholarship performance indicators (or their equivalent)	Possible Merit Score for Research*
Exceeds expectations for merit	Publish a book or submit a book MS. After meeting expectations as outlined below: submitting additional articles (MS) or publication of additional articles or reviews; additional editing (e.g., of journal series or monographs); receiving grant.	5.5 – 7.0
Meets expectations for merit	Two of the following: submitting a MS or publication of an article; presenting a paper at professional organization; publishing a book review; editing a monograph; editing a journal, providing editorial support; submitting grant application.	2.5 – 5.49
Fails to meet expectations for merit	Fail to fulfill at least two of the following: submitting a MS or publication of an article; presenting a paper at professional organization; writing a book review; editing a monograph; editing a journal, providing editorial support.	1.0 – 2.49

**Insert score values on a scale that includes at least seven numerical values, e.g., 1-7point scale.*

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

Evaluation Rating Category	SERVICE Expected levels of accomplishment on service performance indicators (or their equivalent)	Possible Merit Score for Service*
Exceeds expectations for merit	After meeting expectations as outlined below: organize a conference session; take part in a conference session devoted to a professional topic (e.g., roundtable on a program design); hold office in a professional organization; lengthy or extraordinary consulting; serve repeatedly as translator, interpreter, or guest speaker; book MS refereeing; serve on additional work-intensive college, university, or union committee; serve as advisor for a program-related student organization (e.g., German, Japanese, Russian, or other club); demonstrate extensive study abroad recruiting efforts; direct summer study abroad program, make arrangements for writer in residence.	5.5 – 7.0
Meets expectations for merit	Serving on a minimum of three department, college, university, or professional committees; representing the department on Faculty Senate, attending professional conference or providing community service (e.g., consulting or serving as translator, interpreter, guest	2.5 – 5.49

	speaker, etc.) or MS refereeing (article).	
Fails to meet expectations for merit	Did not serve on a minimum of three department, college, university, or professional committees. Did not attend a professional conference, or perform community service (e.g., consulting or serving as translator, interpreter, guest speaker, etc.), or professional service (e.g., MS refereeing (article).	1.0 – 2.49

**Insert score values on a scale that includes at least seven numerical values, e.g., 1-7point scale.*

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/ Librarian Effectiveness	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>