

MERIT TEMPLATE-updated following MOU

Note

For Merit Template Document (pages 1-4): Each Academic Unit will edit material highlighted in blue, insert material where highlighted in yellow, and delete material highlighted in gray.

For Appendix A (pp. 5- 28) and Appendix B (pp. 29-30): Text in blue font is included to show examples of information that could be included; each Academic Unit will replace this with information appropriate to its own discipline, mission, etc.). Text in red font show examples of information that merit committee members might provide when completing the merit instrument.

Merit Document

Department/School of _____

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/school 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 = 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/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/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.

THE DEAN OF EACH COLLEGE WILL DETERMINE WHICH OF THE EXEMPLARS FOR CALCULATING MERIT SCORES FOUND IN APPENDIX A WILL BE USED BY THE ACADEMIC UNITS IN THAT COLLEGE. EACH ACADEMIC UNIT WILL THEN COMPLETE THAT EXEMPLAR AS APPROPRIATE GIVEN THE UNIT'S DISCIPLINE, MISSION, ETC. THE COMPLETED INSTRUMENT WILL BE INCLUDED AS 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/director**.
- 2.2. The **department/school** merit committee is responsible for assigning an overall merit score to every bargaining unit faculty member. **[describe committee composition; election/appointment process]**.
- 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: **[list required elements, e.g., updated cv highlighting activities completed during the previous calendar year (and not submitted to the merit committee in previous years), student teaching evaluations from the previous calendar year, etc.]**
- 2.5. **Insert description of how the overall merit score is calculated. Choose from options provided 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/director**.

February 28: Academic unit faculty committee's merit score recommendation to the **chair/director** (with a copy to the faculty member).

March 7: Last date for faculty members to appeal the committee's recommendation to the **chair/director** (with a copy to the committee).

March 31: **Chair's/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 chair's/director's merit score recommendation to the Dean (with copy to the chair/director). The faculty member may raise in any appeal to the Dean: (i) the chair's/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 chair/director. Issues related to the committee's recommendation not raised previously with the chair/director (where the faculty member either knew or through the exercise of reasonable diligence should have known) are not preserved for appeal to the Dean, shall not be considered by the Dean, and shall not be the basis or grounds for any grievance by the BGSU-FA.

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

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

4. Special Circumstances

4.1. Consideration of Special Circumstances as Required by the Collective Bargaining Agreement

- 4.1.1. **Faculty Exchange Leave** (Article 21, Section II: subsection 1.7). Faculty members shall be entitled to full consideration for merit. The merit evaluations for the faculty members will include consultation with the host institution.
- 4.1.2. **Leaves with Extramural Salary Paid through the University Payroll System** (Article 21, Section III: subsection 1.3) Faculty members shall be entitled to full consideration for merit. The merit evaluations for the faculty members will include consultation with the sponsoring government agency or private foundation.
- 4.1.3. **Unpaid Leave - 100% time** (Article 21, Section IV: subsection 5). Faculty members will not be eligible for merit in any calendar year for which 100% unpaid leave was taken that is unrelated to Family Medical Leave. If related to Family Medical Leave, performance expectations for merit evaluations shall be prorated.
- 4.1.4. **Sick Leave** (Article 21, Section VIII: subsection 9.1). Performance expectations for merit evaluations shall be prorated for faculty members on sick leave for 40 or more days during the calendar year.
- 4.1.5. **Parental Leave** (Article 21, Section IX: subsection 3). Unit Faculty Member who takes parental leave under this Article will only be evaluated for performance during the time in which he or she was not on parental leave (including use of sick leave in addition to parental leave). Performance expectations for merit evaluations that are expressed quantitatively shall be prorated. The Department Chair's/School Director's evaluation shall include a description of the methods used for prorating.
- 4.1.6. **Partial Unpaid Leave – 50% time** (Article 21, Section X: subsection 3.3) Faculty members will not be eligible for merit in any calendar year for which 50% unpaid leave was taken that is unrelated to Family Medical Leave. If related to Family Medical Leave, performance expectations for merit evaluations shall be prorated.
- 4.1.7. **Faculty Improvement Leave** (Article 22, Section 7.3.3) Faculty members shall be entitled to full consideration for merit. The merit evaluations for the faculty members will include consideration of the report submitted to the President detailing accomplishments during the FIL.

4.2. Consideration of Other Special Circumstances

4.2.1. **New Faculty Hires.** New faculty members whose employment begins in the fall semester shall be entitled to full consideration for merit. Performance expectations for merit evaluations shall be prorated.

4.2.2. The unit’s faculty advisory body may also consider special circumstances not covered in 4.1 above and make a recommendation to the unit chair or director. Such exceptional circumstances might include a leave without pay to take a short-term research appointment, a leave without pay to participate in professional development, or other leave without pay that enhances the productivity of the faculty member and the reputation of the institution.

5. Amendment of Merit Policy

The unit faculty may amend performance indicators, performance expectations, and the methods for combining this information into both component and overall merit scores at any time. Amendments to the merit policy must be approved by the Dean and Provost/SVPAA. Approved amendments to the merit policy shall not be applied retroactively in the calculation of the previous year’s merit scores.

6. Additional Information

Insert any information that does not fit in the preceding template items.

Approved by the Department/School of _____ at the Month, Date, Year Faculty Meeting

Name, Chair/Director Date _____

Approved: _____ Date _____
Name, Dean of College Name

Approved: _____ Date _____
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/Librarian Effectiveness, 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/Librarian Effectiveness, Research/Creative Work, and Service).

Three exemplars are available for adaptation and use, as listed below. Immediately following each exemplar is an example of how it might be completed (although it is up to each academic unit to decide what to include in its own exemplar based on discipline, mission, etc.).

Exemplar #1

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.

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 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 (fill in blanks and replace italicized information)

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.)
<i>Insert Performance Indicator #1</i>	<ul style="list-style-type: none"> • <i>Insert Highest Rating Level</i> • <i>Insert Next Highest Rating Level</i> • <i>Etc.</i> • <i>Insert Next Lowest Rating Level</i> <i>Fair</i> • <i>Insert Lowest Rating Level</i> 	
<i>Insert Performance Indicator #2</i>	<ul style="list-style-type: none"> • <i>Insert Highest Rating Level</i> • <i>Insert Next Highest Rating Level</i> • <i>Etc.</i> • <i>Insert Next Lowest Rating Level</i> <i>Fair</i> • <i>Insert Lowest Rating Level</i> 	
<i>Insert Performance Indicator <u>n</u></i>	<ul style="list-style-type: none"> • <i>Insert Highest Rating Level</i> • <i>Insert Next Highest Rating Level</i> • <i>Etc.</i> • <i>Insert Next Lowest Rating Level</i> <i>Fair</i> • <i>Insert Lowest Rating Level</i> 	

Merit Score (point allocation)	Definition and Description
Exceeds Expectations for Merit in Teaching/Librarian Effectiveness <i>(insert score values on a scale that includes at least five numerical values, e.g., 6-7 on a 7-point scale)</i>	<i>Insert Definition and Description that defines what is expected to receive a merit score that “Exceeds Expectations for Merit in Teaching/Librarian Effectiveness”</i>
Meets Expectations for Merit in Teaching/Librarian Effectiveness <i>(insert score values on a scale that includes at least five numerical values, e.g., 3-5 on a 7-point scale)</i>	<i>Insert Definition and Description that defines what is expected to receive a merit score that “Meets Expectations for Merit in Teaching/Librarian Effectiveness”</i>
Fails to Meet Expectations for Merit in Teaching/Librarian Effectiveness <i>(insert score values on a scale that includes at least five numerical values, e.g., 1-2 on a 7-point scale)</i>	<i>Insert Definition and Description that defines what is expected to receive a merit score that “Fails to meet Expectations for Merit in Teaching/Librarian Effectiveness”</i>

Merit Score for Teaching/Librarian Effectiveness

(to be completed by merit committee member): _____

Research/Creative Work (fill in blanks and replace italicized information)

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

Performance Indicators (description)	Evaluation Rating (Circle One)	Basis of the Evaluation Rating (evidence, accomplishment, etc.)
<i>Insert Performance Indicator #1</i>	<ul style="list-style-type: none"> • <i>Insert Highest Rating Level</i> • <i>Insert Next Highest Rating Level</i> • <i>Etc.</i> • <i>Insert Next Lowest Rating Level Fair</i> • <i>Insert Lowest Rating Level</i> 	
<i>Insert Performance Indicator #2</i>	<ul style="list-style-type: none"> • <i>Insert Highest Rating Level</i> • <i>Insert Next Highest Rating Level</i> • <i>Etc.</i> • <i>Insert Next Lowest Rating Level Fair</i> • <i>Insert Lowest Rating Level</i> 	
<i>Insert Performance Indicator <u>n</u></i>	<ul style="list-style-type: none"> • <i>Insert Highest Rating Level</i> • <i>Insert Next Highest Rating Level</i> • <i>Etc.</i> • <i>Insert Next Lowest Rating Level Fair</i> • <i>Insert Lowest Rating Level</i> 	

Merit Score (point allocation)	Definition and Description
Exceeds Expectations for Merit in Research/Creative Work <i>(insert score values on a scale that includes at least five numerical values, e.g., 6-7 on a 7-point scale)</i>	<i>Insert Definition and Description that defines what is expected to receive a merit score that “Exceeds Expectations for Merit in Research/Creative Work”</i>
Meets Expectations for Merit in Research/Creative Work <i>(insert score values on a scale that includes at least five numerical values, e.g., 3-5 on a 7-point scale)</i>	<i>Insert Definition and Description that defines what is expected to receive a merit score that “Meets Expectations for Merit in Research/Creative Work”</i>
Fails to Meet Expectations for Merit in Research/Creative Work <i>(insert score values on a scale that includes at least five numerical values, e.g., 1-2 on a 7-point scale)</i>	<i>Insert Definition and Description that defines what is expected to receive a merit score that “Fails to meet Expectations for Merit in Research/Creative Work”</i>

Merit Score for Research/Creative Work

(to be completed by merit committee member): _____

Service (fill in blanks and replace italicized information)

Pre-Specified Allocation of Effort for Service ___ %

Performance Indicators (description)	Evaluation Rating (Circle One)	Basis of the Evaluation Rating (evidence, accomplishment, etc.)
<i>Insert Performance Indicator #1</i>	<ul style="list-style-type: none"> • <i>Insert Highest Rating Level</i> • <i>Insert Next Highest Rating Level</i> • <i>Etc.</i> • <i>Insert Next Lowest Rating Level</i> <i>Fair</i> • <i>Insert Lowest Rating Level</i> 	
<i>Insert Performance Indicator #2</i>	<ul style="list-style-type: none"> • <i>Insert Highest Rating Level</i> • <i>Insert Next Highest Rating Level</i> • <i>Etc.</i> • <i>Insert Next Lowest Rating Level</i> <i>Fair</i> • <i>Insert Lowest Rating Level</i> 	
<i>Insert Performance Indicator <u>n</u></i>	<ul style="list-style-type: none"> • <i>Insert Highest Rating Level</i> • <i>Insert Next Highest Rating Level</i> • <i>Etc.</i> • <i>Insert Next Lowest Rating Level</i> <i>Fair</i> • <i>Insert Lowest Rating Level</i> 	

Merit Score (point allocation)	Definition and Description
Exceeds Expectations for Merit in Service <i>(insert score values on a scale that includes at least five numerical values, e.g., 6-7 on a 7-point scale)</i>	<i>Insert Definition and Description that defines what is expected to receive a merit score that “Exceeds Expectations for Merit in Service”</i>
Meets Expectations for Merit in Service <i>(insert score values on a scale that includes at least five numerical values, e.g., 3-5 on a 7-point scale)</i>	<i>Insert Definition and Description that defines what is expected to receive a merit score that “Meets Expectations for Merit in Service”</i>
Fails to Meet Expectations for Merit in Service <i>(insert score values on a scale that includes at least five numerical values, e.g., 1-2 on a 7-point scale)</i>	<i>Insert Definition and Description that defines what is expected to receive a merit score that “Fails to meet Expectations for Merit in Service”</i>

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>

EXEMPLAR #1 EXAMPLE (for illustrative purposes only):

The following rubrics indicate a hypothetical unit's approved performance indicators used to evaluate faculty performance expectations in the areas of teaching, research, and service. Merit committee members will individually review the faculty member's merit dossier, provide a rating for each performance indicator, and note in the "Basis of the Evaluation Rating" any evidence or accomplishment to justify his/her rating. Each merit committee member would then assign a component rating in the areas of teaching, research, and service.

Teaching

Teaching Assignment for calendar year: Spring: 1010, 2020 (two sections); Fall: 1010, 4050, 7000

Pre-specified allocation of Effort for teaching: 50 %

Performance Indicators (description)	Evaluation Rating (Circle One)	Basis of the Evaluation Rating (evidence, accomplishment, etc.)
<i>Quantitative ratings</i> of teaching effectiveness. Student ratings of teaching effectiveness for all courses taught during the preceding 12 months	<ul style="list-style-type: none"> • Excellent • Good • Fair • Poor 	Average 4.7 on 5 point scale
<i>Qualitative ratings</i> of teaching effectiveness. Representative sampling and overview of themes and comments from students' open ended feedback	<ul style="list-style-type: none"> • Highly positive • Positive • Neutral • Negative • Not included in portfolio 	Mostly positive comments
<i>Peer reviews</i> of teaching effectiveness	<ul style="list-style-type: none"> • Excellent • Good • Fair • Poor • N/A* 	Two extremely positive peer reviews

<p><i>Instructional development.</i> Analysis of teaching performance and subsequent documented improvements in teaching performance as evident through teaching philosophy.</p>	<ul style="list-style-type: none"> • In depth, thoughtful, shows improvement where needed. • Thoughtful analysis, implementation for efforts to improve. • Some analysis and awareness of need to improve. • Limited analysis; no evidence of needed improvement efforts. • No self-analysis of teaching performance. 	<p>Limited documentation of student performance on learning outcomes</p>
<p><i>High impact learning activities</i> (Examples include – service-learning; undergraduate research; active learning; novel approaches to teaching)</p>	<ul style="list-style-type: none"> • High level of activity—2 or more • Moderate level of activity—1 • Training to incorporate high impact activities (e.g., learning community participation) • No high impact activities 	<p>No evidence presented</p>
<p><i>Non classroom teaching</i> in addition to teaching assignment (Examples include – thesis and dissertation direction; honors project direction; graduate student mentoring; guest lecturing; peer mentoring)</p>	<ul style="list-style-type: none"> • Very high level of activity—3 or more with leadership roles • High level of activity—2 or more, OR 1 with leadership role • Moderate level of activity—1, no leadership role • No involvement in non-classroom instruction • N/A 	<p>Chairing three theses and serving on two doctoral/masters committees</p>
<p><i>Other</i> (Examples of other evidence for teaching effectiveness: student performance/success; teaching awards; active engagement in continuing education to support teaching effectiveness; development of new courses).</p>	<ul style="list-style-type: none"> • Superior • Good • Fair • Poor 	<p>n/a</p>

Merit Score (point allocation)	Definition and Description
<p>Exceeds Expectations for Merit in Teaching (6-7)</p>	<p>Preponderance of ratings are in the highest categories OR preponderance of ratings are in the upper-middle categories with one aspect rated as truly exceptional</p> <p>Innovative teacher; provides leadership in instructional development</p>
<p>Meets Expectations for Merit in Teaching (3-5)</p>	<p>Preponderance of ratings are in the middle to upper middle categories</p> <p>Meets obligations well</p>
<p>Fails to Meet Expectations for Merit in Teaching (1-2)</p>	<p>Preponderance of ratings are in the lowest categories</p> <p>Minimally meets expectations for performance but not to the level deserving of merit</p> <p>Substandard and ineffective teacher</p>

Merit Score for Teaching (to be completed by merit committee member): 5.5

Research

Pre-specified allocation of effort for research 30 %

Performance Indicators (description)	Evaluation Rating (Circle One)	Basis of the Evaluation Rating (evidence, accomplishment, etc.)
<p><i>Research & Scholarly Dissemination</i></p> <ol style="list-style-type: none"> Peer-reviewed papers accepted Books and book chapters Non-peer reviewed papers Manuscripts under review Peer-reviewed presentations, selective conferences OR invited presentation, national or international Peer-reviewed presentations, less selective conference Invited presentations (regional/local) 	<ul style="list-style-type: none"> Superior. 4+ examples, with at least 2 from category 1 OR 3+ examples in top 2 categories Excellent. 4+ examples, with at least one from category 1 OR 2 examples in category 1. Very good. 3 examples, at least 1 of which is from categories 1-4. Good. 2 examples from any of categories 2 through 7. Fair. 1 Example. Poor. No activity to report. <p>NOTE: Multiple examples in one category are considered positively in overall evaluation.</p> <p>The committee will consider information on the selectivity of journals in making its overall evaluation.</p>	<p>Peer reviewed paper, multiple conference presentations</p>
<p><i>Research funding</i></p> <ol style="list-style-type: none"> Significant external grant activity (for example, award of external grants, \$25K and up; may be claimed in multiple years for multiple year grants) Awarded external grant, <\$25K Awarded internal grant, \$5K and up Awarded internal grant, <\$5K Applied for category 1 grant Applied for category 2 grant Applied for category 3 grant Applied for category 4 	<ul style="list-style-type: none"> Superior. Category 1. Excellent. Category 2 or 3. Very good. Category 4, 5, and/or 6 Good. Category 7 or 8 Fair. Category 9 or 10 No activity. <p>Activities as PI most highly ranked, but subcontracts, consultancy, and other collaborative efforts resulting in funding are eligible to be considered in categories 1 and 2.</p>	<p>Applied for internal grant to support graduate student</p>

<p>grant</p> <p>9. Plan for applying for external funding</p> <p>10. Plan for applying for internal funding</p>		
<p><i>Ongoing research</i></p> <p>1. Project being written for peer-reviewed publication</p> <p>2. Project being written for peer-reviewed conference presentation</p> <p>3. Project in data analysis</p> <p>4. Project in data collection</p> <p>5. Project in development (e.g., HSRB protocol in preparation or pilot work being planned)</p>	<ul style="list-style-type: none"> • Excellent. Category 1 activity reported and at least 1 from categories 2-4. • Good. 2 activities reported, from 2-4. • Fair. 1 activity reported, from 2-5. • Poor. No activity. <p>NOTE: The committee is directed to recognize that some projects may change status over the course of the year; the faculty member should make clear his/her research trajectory.</p> <p>The committee can consider overall number and stages of development of projects in its overall assessment.</p>	<p>Two articles for peer-reviewed pubs and two peer-reviewed conference papers underway</p>
<p><i>Research infrastructure</i></p>	<ul style="list-style-type: none"> • Good. A clear pattern of multiple activities to develop a functioning lab or project, including setting up &/or learning new equipment, software, &/or procedures, recruiting and training lab assistants, devising successful protocols. Evidence presented of benchmarks met (e.g., purchase of start up equipment and training in its use). • Adequate. Some activities, as listed above, either lesser in extent or somewhat less clear in terms of evidence presented. • Poor. Expected benchmarks not met (e.g., failure to develop a functioning lab during start up period). • N/A. Labs at high performance already with no need for development OR research not conducted in a lab environment. 	<p>n/a</p>
<p><i>Intellectual property</i></p>	<ul style="list-style-type: none"> • Superior. Significant ongoing work leading to intellectual property, with clear evidence of 	<p>n/a</p>

	<p>outcomes achieved (e.g., patent application file, copyright registered for the university, or licensing agreement signed)</p> <ul style="list-style-type: none"> • Good. Some evidence of work leading to the above. • N/A. NOTE: Most will be scored here. This category is not to be scored except for those who have relevant activities. 	
<i>Other</i>	<ul style="list-style-type: none"> • Superior • Good • Fair • Poor <p>Examples include but are not limited to: awards and recognitions for research activities (editor's awards, university recognition, fellowship in professional and scholarly societies); substantial service that is scholarly in nature (e.g., editorship of journals, invitations to participate in reviewing activities); publications in highly selective venues or invitations to keynote at prestigious conferences; outstanding mentorship of students in research (may overlap with teaching but if relevant may be included in scholarly portfolio).</p>	Associate editor appointment in top journal

Merit Score (point allocation)	Definition and Description
Exceeds Expectations for Merit in Research (6-7)	<p>Preponderance of ratings are in the highest categories OR preponderance of ratings are in the upper-middle categories with one aspect rated as truly exceptional</p> <p>Clear line of inquiry and established research program, meaningful integration and application</p>
Meets Expectations for Merit in Research (3-5)	<p>Preponderance of ratings are in the middle to upper middle categories</p> <p>Active scholarship</p>
Fails to Meet Expectations for Merit in Research (1-2)	<p>Preponderance of ratings are in the lowest categories</p> <p>Minimally meets expectations for performance but not to the level deserving of merit</p> <p>Limited or no research program</p>

Merit Score for Research (to be completed by merit committee member): 6.2

Service

Pre-Specified Allocation of Effort for Service 20 %

Performance Indicators (description)	Evaluation Rating (Circle One)	Basis of the Evaluation Rating (evidence, accomplishment, etc.)
<i>Faculty Advising</i>	<ul style="list-style-type: none"> • Acceptable. Is regularly available, provides appropriate advising for student success. • Unacceptable. Fails to be available; refuses to schedule advising appointments when requested; fails to respond to emails); and/or regularly fails to provide appropriate advising • N/A. No advising responsibilities. 	n/a
<i>Participation in department service</i>	<ul style="list-style-type: none"> • Superior. Attends faculty meetings, supports student recruitment events, participates successfully in 3 or more committees/activities AND/OR chairs 1 heavy responsibility committee. • Excellent. Attends faculty meetings, supports student recruitment events, participates successfully in 2 or more committees/activities. • Good. Attends faculty meetings, supports student recruitment events, participates successfully in 1 committee. • Fair. Record of attendance at faculty meetings is inconsistent, &/or does not support student recruitment events. Participates in 1 committee, minor role. • Poor. Fails to meet standards for "fair" rating as listed above. • N/A 	Attends open houses; member of curric committee
<i>College and university service.</i>	<ul style="list-style-type: none"> • Superior. Participates in 2 or more college or university committees/efforts with a leadership role in one. • Excellent. Participates in two college or university committees/efforts OR chairs one OR participates in exceptionally heavy workload 	Member college PTRC

	<p>committee (e.g., HSRB).</p> <ul style="list-style-type: none"> • Good. Participates in at least one college or university committee/effort with significant workload. • Fair. Participates in one college or university committee with minimal workload. • Poor. No college or university service. OR • N/A Service not required in early years on tenure track. OR not required of NTTF. 	
<i>Service to the profession</i>	<ul style="list-style-type: none"> • Superior--High level of activity—3 or more activities, and a leadership role • Excellent. 3 or more activities OR leadership role in 1. * • Good. 2 activities. • Fair. 1 activity. • Poor. No service to the profession.** OR • N/A. Service to the profession not expected. 	Reviewed several submissions to regional conference
<i>Community service</i>	<ul style="list-style-type: none"> • Superior--High level of activity—3 or more activities, plus leadership role(s) • Excellent. 3 or more activities. • Good. 2 activities. • Fair. 1 activity. • Poor. No service to the community.** OR • N/A. Service to the community not expected. 	Presentation to Kiwanis on recent book chapter: mental health trends
<p><i>Other</i></p> <p>Other evidence for effectiveness submitted by the faculty member to be rated here, including but not limited to: awards for service; unusual amount of service for rank/years in rank; exceptional leadership and/or unique projects with high impact; high visibility in state and national service, etc. Faculty should provide sufficient information so that the committee can determine what the role was that the faculty member played.</p>	<p>Evaluation of additional evidence</p> <ul style="list-style-type: none"> • Superior • Good • Fair • Poor 	Nothing submitted

Merit Score (point allocation)	Definition
Exceeds Expectations for Merit in Service (6-7)	Preponderance of ratings are in the highest categories OR preponderance of ratings are in the upper-middle categories with one aspect rated as truly exceptional
Meets Expectations for Merit in Service (3-5)	Preponderance of ratings are in the middle to upper middle categories
Fails to Meet Expectations for Merit in Service (1-2)	Preponderance of ratings are in the lowest categories Minimally meets expectations for performance but not to the level deserving of merit

Merit Score for Service (to be completed by merit committee member): 3.5

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	Merit Score for Service
Alpha, J	5.5	6.2	3.5
Next faculty member			
Next faculty member			

EXEMPLAR #2

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.

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 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 score may include any number of values or rating levels, but it must clearly identify whether the overall merit score reflects performance that fails to meet expectations, meets expectations, or exceeds expectations for merit.

Teaching/Librarian Effectiveness: Performance Indicators

Performance Indicator	Does Not Meet Expectations for merit (1-2)*	Meets Expectations for Merit (3-5)*	Exceeds Expectations for Merit (6-7)*	ASSIGNED RATING:	WEIGHTS (sum to total number of Performance Indicators)	WEIGHTED RATING ON EACH PERFORMANCE INDICATOR (Assigned Rating * Weight)
<i>Insert Performance Indicator #1</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>		<i>Insert Weight for this Performance Indicator</i>	
<i>Insert Performance Indicator #2</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>		<i>Insert Weight for this Performance Indicator</i>	
<i>Insert Performance Indicator #n</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>		<i>Insert Weight for this Performance Indicator</i>	
					Σ weights = ____	Σ Weighted Ratings = ____
					MERIT RATING FOR TEACHING: _____ (weighted ratings/weights)	

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

Research/Creative Work: Performance Indicators

Performance Indicator	Does Not Meet Expectations for merit (1-2)*	Meets Expectations for Merit (3-5)*	Exceeds Expectations for Merit (6-7)*	ASSIGNED RATING:	WEIGHTS (Must sum to total number of Performance Indicators)	WEIGHTED RATING ON EACH PERFORMANCE INDICATOR (Assigned Rating * Weight)
<i>Insert Performance Indicator #1</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>		<i>Insert Weight for this Performance Indicator</i>	
<i>Insert Performance Indicator #2</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>		<i>Insert Weight for this Performance Indicator</i>	
<i>Insert Performance Indicator #n</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>		<i>Insert Weight for this Performance Indicator</i>	
					Σ weights = ____	Σ Weighted Ratings = ____
					MERIT RATING FOR RESEARCH: _____ (weighted ratings/weights)	

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

Service: Performance Indicators

Performance Indicator	Does Not Meet Expectations for merit (1-2)*	Meets Expectations for Merit (3-5)*	Exceeds Expectations for Merit (6-7)*	ASSIGNED RATING:	WEIGHTS (Must sum to total number of Performance Indicators)	WEIGHTED RATING ON EACH PERFORMANCE INDICATOR (Assigned Rating * Weight)
<i>Insert Performance Indicator #1</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>		<i>Insert Weight for this Performance Indicator</i>	
<i>Insert Performance Indicator #2</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>		<i>Insert Weight for this Performance Indicator</i>	
<i>Insert Performance Indicator #n</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>	<i>Insert Expected Level of Performance</i>		<i>Insert Weight for this Performance Indicator</i>	
					Σ weights = ____	Σ Weighted Ratings = ____
					MERIT RATING FOR SERVICE: _____ (weighted ratings/weights)	

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

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>

EXEMPLAR #2 EXAMPLE (for illustrative purposes only):

The following rubrics indicate a hypothetical unit's approved performance indicators used to evaluate faculty performance expectations in the areas of teaching, research, and service. Merit committee members will individually review the faculty member's merit dossier and provide a rating for each performance indicator in each of the areas of teaching, research, and service. (Note: While the component rating categories shown here include seven levels, any number of values or rating levels five or more may be used; the only requirement is that they clearly identify whether the rating/value reflects performance that fails to meet expectations, meets expectations, or exceeds expectations for merit.) Each component merit rating (teaching, research, and service) would be calculated by multiplying the rating on each performance indicator by its assigned weight (which were approved previously by the unit faculty).

Teaching: Performance Indicators

Performance Indicator	Does Not Meet Expectations for Merit (0 -2)	Meets Expectations for Merit (3-5)	Exceeds Expectations for Merit (6-7)	ASSIGNED RATING:	WEIGHTS (sum to total number of Performance Indicators)	WEIGHTED RATING ON EACH PERFORMANCE INDICATOR (Assigned Rating * Weight)
Quantitative Student Evaluations	average below 3.0 out of 4	most between 3.0 and 3.5 out of 4, average above 3.0	most above 3.5 out of 4, average above 3.5	5	2	10
Qualitative Student Evaluations	less than 50% positive comments	50% - 74% positive comments	75% - 100% positive comments	6	1	6
Peer Reviews (at least one required using dept form)	either no peer review or Poor-Fair peer review	good peer review(s)	excellent peer review(s)	6.5	1	6.5
Professional Development	no PD activities	one PD activity (or equivalent)	more than one PD activity (or equivalent)	0	.5	0
High Impact Practices	no HI practices	one HI practice (or equivalent)	more than one HI practice (or equivalent)	4	.5	2
Instructional Development	no ID activities	one ID activity (or equivalent)	more than one ID activity (or equivalent)	5.5	1	5.5
Non-Classroom Teaching (e.g, theses, dissertations, honors project direction)	no NCT activities	average number of NCT activities (or equivalent)	above average number of NCT activities (or equivalent)	7	1	7
					Σ weights = 7	Σ Weighted Ratings = 37.0
					MERIT RATING FOR TEACHING: 5.3 (weighted ratings/weights)	

Research: Performance Indicators

Performance Indicator	Does Not Meet Expectations for Merit (1-2)	Meets Expectations for Merit (3-5)	Exceeds Expectations for Merit (6-7)	ASSIGNED RATING:	WEIGHTS (Must sum to total number of Performance Indicators)	WEIGHTED RATING ON EACH PERFORMANCE INDICATOR (Assigned Rating * Weight)
Peer-reviewed journal articles & conference papers accepted (or equivalent)	0 articles or papers at all; some nonpeer-reviewed articles or papers	1 peer-reviewed journal article and 1 peer-reviewed conference paper	2 or more peer-reviewed articles plus 1 or more conference papers	6	2	12
Published book review and/or Proceedings publications (or equivalent)	0	1	2 or more	3	.5	1.5
Ongoing Research (manuscripts under review, in final stages of writing, writing, in data collection phase) (or equivalent)	no activity	1-2 new activities (i.e., not included in previous year merit submission)	2 or more new activities (i.e., not included in previous year merit submission)	7	.5	3.5
Research Funding (or equivalent)	no activity; plans for applying for internal or external funding	some activity; is preparing or has submitted internal or external grants; internal award	high activity; external (\$25K+); multiple year awards may be claimed across multiple merit years	2.5	1.5	3.8
Other (Applied research projects, commercialization of intellectual property, research recognition, or equivalent)	no activity/accomplishments or recognition / awards	some activity/accomplishments or recognition/ awards	high activity/accomplishments or recognition/ awards	4.5	.5	2.3
					Σ weights = 5	Σ Weighted Ratings = 23.1
					MERIT RATING FOR RESEARCH: 4.6 (weighted ratings/weights)	

Service: Performance Indicators

Performance Indicator	Does not Meet Expectations for Merit (1-2)	Meets Expectations for Merit (3-5)	Exceeds Expectations for Merit (6-7)	ASSIGNED RATING:	WEIGHTS (Must sum to total number of Performance Indicators)	WEIGHTED RATING ON EACH PERFORMANCE INDICATOR (Assigned Rating * Weight)
Department Service & Committees	Limited to no engagement (no advising or committees; limited attendance at faculty meetings)	Chairs one committee, serves on at least one more active committee, volunteer service and advising (or equivalent)	Chairs two or more committees and serves on at least one more active committee, volunteer service and advising (or equivalent)	7	1.5	10.5
College Committees	No participation on college committees or events	Serves on at least one committee, volunteer involvement at college level (or equivalent)	Chairs at least one or serves on two or more committees, heavy volunteer involvement at college level (or equivalent)	3.5	1	3.5
University Committees	No participation on university committees or events	Serves on at least one committee, faculty senator, volunteer involvement at university level (or equivalent)	Chairs at least one or serves on two or more committees, heavy volunteer involvement at university level (or equivalent)	1	1	1
Professional Organizations	No participation	Serves on at least one committee, volunteer services (or equivalent)	Chairs at least one or serves on two or more committees, heavy volunteer involvement (or equivalent)	4.5	1	4.5
Community Service	limited (1 brief activity) or no	2 -3 significant community	More than 3 significant	6.5	1	6.5

(Related to BGSU Faculty Appointment)	participation	service activities, 1 of which is extensive/ongoing	community service activities, 2 or more of which are extensive/ongoing			
Other (e.g., awards for service; exceptional leadership and/or unique projects with high impact; high visibility in state and national service, etc.)	Nothing submitted	1 example of service award, leadership, high impact practice, or high visibility service (or equivalent)	2 or more examples of service award, leadership, high impact practice, or high visibility service (or equivalent)	1	.5	.5
						Σ weights = 6 Σ Weighted Ratings = 26.5
						MERIT RATING FOR SERVICE: 4.4 (weighted ratings/weights)

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	Merit Score for Service
Bravo, T	5.3	4.6	4.4
Next faculty member			
Next faculty member			

Exemplar #3

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 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	TEACHING/LIBRARIAN EFFECTIVENESS Expected levels of accomplishment on teaching performance indicators (or their equivalent)	Possible Merit Score for Teaching*
Exceeds expectations for merit	<i>(insert expectations here)</i>	3.6 – 5.0
Meets expectations for merit	<i>(insert expectations here)</i>	1.6 – 3.5
Fails to meet expectations for merit	<i>(insert expectations here)</i>	1.0 – 1.5

*Insert score values on a scale that includes at least five numerical values, e.g., 1-5point scale.

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

Evaluation Rating	SCHOLARSHIP/CREATIVE WORK	Possible Merit Score
-------------------	----------------------------------	----------------------

Category	Expected levels of accomplishment on teaching performance indicators (or their equivalent)	for Research*
Exceeds expectations for merit	<i>(insert expectations here)</i>	3.6 – 5.0
Meets expectations for merit	<i>(insert expectations here)</i>	1.6 – 3.5
Fails to meet expectations for merit	<i>(insert expectations here)</i>	1.0 – 1.5

*Insert score values on a scale that includes at least five numerical values, e.g., 1-5point scale.

Merit Score for Research (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*
Exceeds expectations for merit	<i>(insert expectations here)</i>	3.6 – 5.0
Meets expectations for merit	<i>(insert expectations here)</i>	1.6 – 3.5
Fails to meet expectations for merit	<i>(insert expectations here)</i>	1.0 – 1.5

*Insert score values on a scale that includes at least five numerical values, e.g., 1-5point 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>

EXEMPLAR #3 EXAMPLE (for illustrative purposes only):

The following rubrics indicate a hypothetical unit's approved performance indicators used to evaluate faculty performance expectations in the areas of teaching, research, and service. Merit committee members will individually review the faculty member's merit dossier and provide a score in each of the areas of teaching, research, and service. (Note: While the scores used here range from 1.0 – 5.0, any range of scores that is five or more may be used; the only requirement is that scores clearly identify whether they reflect 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
Exceeds expectations for merit	Quantitative student evaluations regularly exceed departmental averages for similar courses, and qualitative evaluative comments are general positive. Observations by peers indicate highest levels of excellence in the classroom. Innovative teaching practices and high impact learning activities are regularly introduced and evaluated. Regular engagement in professional activities related to teaching effectiveness	3.6 – 5.0
Meets expectations for merit	Quantitative student evaluations approximate departmental averages for similar courses, and qualitative evaluative comments are general positive. Observations by peers indicate high levels of performance in the classroom. Innovative teaching practices and high impact learning activities are occasionally introduced with some assessment of their impact. Modest engagement in professional activities related to teaching effectiveness	1.6 – 3.5
Fails to meet	Quantitative student evaluations are among lowest in department for similar courses, and qualitative	1.0 – 1.5

expectations for merit	evaluative comments are mixed. Observations by peers indicate significant opportunities for improvement. Innovative teaching practices and high impact learning activities are generally absent and rarely evaluated. Limited or no engagement in professional activities related to teaching effectiveness	
------------------------	---	--

Merit Score for Teaching (to be completed by merit committee member): 4.5

Evaluation Rating Category	RESEARCH Expected levels of accomplishment on teaching performance indicators (or their equivalent)	Possible Merit Score for Research
Exceeds expectations for merit	2 or more peer-reviewed articles + 1 or more conference papers; 2 or more active research projects that were not included in previous year merit submission; high activity in grantsmanship with external funding of \$25K+ (multiple year awards may be claimed across multiple merit years); recognition/award for research activity/accomplishments	3.6 – 5.0
Meets expectations for merit	1 peer-reviewed journal article + 1 peer-reviewed conference paper; 1-2 new active research projects that were not included in previous year merit submission; some activity in grantsmanship such as preparing/submitted internal or external grants; internal funding award	1.6 – 3.5
Fails to meet expectations for merit	No peer-reviewed articles or conference papers (but some non-peer-reviewed articles or papers); no current active research projects since last year merit submission; no active grantsmanship or clear plans for applying for internal or external funding; no recognition/ awards for research	1.0 – 1.5

Merit Score for Research (to be completed by merit committee member): 2.1

Evaluation Rating Category	SERVICE Expected levels of accomplishment on teaching performance indicators (or their equivalent)	Possible Merit Score for Service
Exceeds expectations for merit	Departmental service includes chairing 2 or more department committees and serving on at least 1 more active committee + volunteer service and student advising; College service includes chairing at least 1 committee or serving on 2 or more committees + heavy volunteer involvement at college level; University and/or professional service includes chairing at least 1 committee/activity or serving on 2 or more committees/activities + volunteer involvement at university level; Community service includes 3 or more	3.6 – 5.0

	significant community service activities related to faculty appointment (with 2 or more of being extensive/ongoing); 2 or more examples of the following: service award, significant service leadership, high impact practice, or high visibility service	
Meets expectations for merit	Departmental service includes chairing 1 department committees and serving on at least 1 more active committee + volunteer service or student advising; College service includes serving on 1 or more committees + some volunteer involvement at college level; University and/or professional service includes serving on at least 1 committee/activity + some volunteer involvement at university or to profession; Community service includes 1 or more significant community service activity related to faculty appointment	1.6 – 3.5
Fails to meet expectations for merit	Limited to no engagement (no advising or committees; limited attendance at faculty meetings) at departmental level; No significant service participation at college, university, or professional levels; limited community engagement (1 brief activity or no participation);	1.0 – 1.5

Merit Score for Service (to be completed by merit committee member): 1.2

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	Merit Score for Service
Charlee, F	4.5	2.1	1.2
Next faculty member			
Next faculty member			

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 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.

Three exemplars are available for adaptation and use: holistic judgment of the merit committee, a guiding rubric based on ratings in each performance area, or through the use of a simple algorithm that mathematically weights each performance criteria.

Exemplar A: Holistic Judgment of Merit Committee

The merit committee takes allocation of effort into consideration when holistically combining their consensus ratings for teaching, research, and service to arrive at an overall merit score.

Overall Merit Score	Interpretation
1 – 2	Fails to meet basic expectations for merit; Recommendation for no merit
3– 6	Meets basic expectations for merit; Eligible for merit
7 – 9	Exceeds expectations for merit; Eligible for merit

Exemplar B: Rubric Based on Ratings in Each Performance Area

The merit committee takes allocation of effort into consideration when holistically combining their consensus ratings for teaching, research, and service to arrive at an overall merit score.

Overall Merit Score	Calculation (assumes component performance ratings made on 7-point scale)	Interpretation
1-2	Receipt of ratings of 1-2 (on 7-point scale) in two or more performance areas (teaching/librarian effectiveness, research/creative work, or service) or rating of 1-2 in one performance area and ratings of 3 in the other performance areas	Fails to meet basic expectations for merit; Recommendation for no merit
3	Receipt of rating of 3-5 (on 7-point scale) in all three performance areas	Meets basic expectations for merit; Eligible for merit
4	Receipt of a rating of 6-7 (on 7-point scale) in one performance area (for which a high allocation of effort is assigned)	Meets basic expectations for merit; Eligible for merit
5	Receipt of a rating of 6-7 (on 7-point scale) in two performance areas, with one performance area having a high allocation of effort assigned and one performance area having a low allocation of effort assigned	Meets basic expectations for merit; Eligible for merit
6	Receipt of a rating of 6-7 (on 7-point scale) in two performance areas, both of which have a high allocation of effort assigned	Exceeds expectations for merit; Eligible for merit
7	Receipt of a rating of 6-7 (on 7-point scale) in all three performance areas	Exceeds expectations for merit; Eligible for merit

Exemplar C: 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:

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

Overall Merit Score	Interpretation (assumes component performance ratings made on 7-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