

**Merit Policy**  
**Part II: Academic Unit Criteria, Standards, and Processes**

Academic Unit: Department of History

Merit Criteria, Performance Indicators and Expectations

The Evaluation Committee (EC) and the Department Chair will appraise the overall levels of quality and quantity of performance, engagement, and contributions that faculty members demonstrate in the domains of teaching, research, and service. The totality of evidence will inform the overall scores in each of these three domains.

The Evaluation Committee and the chair will follow the scoring outlined in the third column, Basis of the Evaluation Rating, and may marginally adjust the score based on the criteria. No category (row of the table) may receive more points than those stated in the second column, Maximum Rating, and no domain should receive more than 6 points.

**Teaching Effectiveness**

<b>Performance Indicators (description)</b>	<b>Maximum Rating per Indicator</b>	<b>Basis of the Evaluation Rating (criteria, evidence, etc.)</b>
Student evaluation of teaching (SET)	Capped at 3.5	2 points if the average SET exceeds 3.5. 3 points if the average SET exceeds 4.5 points. The SETs referred to in this document are the average of all quantitative scores in a five-point scale. The Evaluation Committee and the Chair may establish different thresholds and adjust scores based on trajectory of improvement, implicit biases in evaluations, qualitative evaluations, substantial changes in the course setting, total number of preparations in a semester and last-minute course assignments; a rationale must be provided for these adjustments.
Concluded BGSU thesis under the direction of the faculty member	Capped at 1.5	A directed and concluded thesis should typically count as 0.75 point. Dissertations may be treated as theses, unless the faculty member is not a regular member of a doctoral program, in which case the dissertation will be scored 1.5 points.
Engagement in graduate mentorship	Capped at 1.5	Membership in graduate examinations and thesis committees (0.50 per student); direction of independent studies (0.25 per student, not to exceed 0.5 in total), and other documented forms of professional preparation for groups of students (0.25 to 0.50 points in total).
Engagement in undergraduate mentorship	Capped at 1.5	Includes supervision of a teaching assistantship, a CURS project, a Honors thesis, mentorship of a

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		publication or public presentation. Typically 0.5 per each instance.
Research requisite for attaining and maintaining graduate faculty status (QRF only)	Capped at 2	Completion of research items as outlined in the departmental graduate faculty status guidelines. Items a-c (peer-reviewed book, journal article, and book chapter) receive 1 point per instance in the AY completed, while items d-g would receive 0.5 points each.
Introduction of curriculum changes	Capped at 1.5	Includes formal revisions from minor changes in courses (0.25), to additions of new courses to the catalog (1.0), to program-level changes (1.5).
Teaching new courses	Capped at 1.0	First-time teaching of required courses (1.0); delivery of courses in the graduate program in areas outside of the primary expertise of current tenure-track faculty (1.0); other new courses (including thematic sections of BGSU 1910), 0.5.
Teaching award	Capped at 6	Must be a competitive award by the college (2-3 points), university (3-4 points), or an external organization (4-6 points).
Nominations to teaching awards	Capped at 1.5	Nominations by students to awards at the university-level or above (1 point). Other forms of external recognition may be considered as well (up to 0.5 points).
Participation in teaching and learning professional development	Capped at 1	Typically 0.5 point for participation in: CFE Learning Communities and similar local groups; conferences or workshops in the scholarship of teaching and learning.
Adoption of instructional techniques or collaborative teaching	Capped at 1	Typically 0.5 point for activities such as: adoption of techniques that improve student engagement (e.g. clickers, revamped assignments), substantial changes in the syllabus, accessibility (use of free textbooks), team teaching, deep linking of courses and similar experiences.
Adaptation of a course to fit a different format or learning outcomes	Capped at 1	Typically 0.5 point for activities such as: the preparation of a course for web-centric delivery; its adaptation to a different class size, or number of credit hours and/or a different length of semester; preparation of a course to serve goals of other program (e.g. adapt a course for BGP delivery, or a different level); preparation of a course that has not been taught for several years.
Instructional and curriculum development grants	Capped at 1	The submission of an instructional grant should receive 0.5 points; its award 1 point. The scale of the project, however, may deserve a higher score. Use research grants as guidance.

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Other documented forms of teaching effectiveness and development not included in this form	Capped at 1	The faculty member may include evidence that other aspects of their instructional effectiveness and curriculum development that deserve to be evaluated.
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Merit Score (point allocation)	Definition and Description
<b>Exceeds Expectations for Merit in Teaching</b>	3.6 to 6.0 points
<b>Meets Expectations for Merit in Teaching</b>	2.0 to 3.5 points
<b>Fails to Meet Expectations for Merit in Teaching</b>	1.0 to 1.9 points
<b>Unacceptable Performance in Teaching</b>	0 to 0.9 points.  Performance is deemed unacceptable if these three conditions apply: <ul style="list-style-type: none"> <li>• quantitative student evaluation scores below 2 on 5-point scale;</li> <li>• poor qualitative evaluations during the review period;</li> <li>• little or no indication of effort to address identified concerns.</li> </ul>

**Merit Score for Teaching Effectiveness**  
(to be completed by Evaluation Committee member): \_\_\_\_\_

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**Research**

<b>Performance Indicators (description)</b>	<b>Maximum Rating per Indicator</b>	<b>Basis of the Evaluation Rating (criteria, evidence, etc.)</b>
Academic monograph or peer-reviewed book	Capped at 7	Typically, 6 points (+/- 1 points) for an academic monograph published by a university press, or a peer-reviewed book published by commercial press.
Editing a special issue of a journal, a book or an encyclopedia	Capped at 3	Typically, 2 points (+/- 1 point) per edited volume; prestige/selectiveness of the publisher, and complexity of the text may increase or decrease points.
Scholarly journal article or chapter in an academic edited volume	Capped at 6	Impact factor, prestige or selectiveness of the publisher, complexity of the text should be considered. 3 points for an article in a journal ranked at the top quartile of the discipline in the Thomson Reuters' Journal Citation Reports; 2 to 2.5 points for an article in a journal abstracted in major indexes (e.g. Historical Abstracts or the JCR); 1 to 1.5 points for an article in a journal not listed in major indexes. Articles that substantially reuse the research base of previous articles will be considered for 0.5-1.5 points.
Large-scale scholarly project for the general public	Capped at 3	1-3 points for a leading role in a project. Large scale may mean an exhibit, a book, a series of articles or public lectures, a digital humanities website, performance, documentary, podcast, among other possibilities. The evaluation rests on the complexity of the product, and evidence of the scope of the audience. For example: A project featured in the national press or by a national professional organization may receive a score of 3.0. A project with local funding or featured in the local media should be rewarded 1.0 or 1.5 points.
Small contribution in a scholarly project for the general public	Capped at 1.5	Each contribution typically receives 0.5 points. Articles in blogs, a contribution to a podcast or a database, an article in a magazine or non-peer reviewed journal, a public lecture. A minor but expert contribution such as the appearance in a documentary, a consulting role in an exhibit or digital history project or an interview may be

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		counted here. The evaluation rests on the scope of the audience and prestige of the venue; see large-scale contribution for guidance.
Receiving or reaching finalist stage for an award for academic or public-oriented scholarship	Capped at 4.	The evaluation point value rests on whether it is on-campus or local (1 point), regional (2 points) or national award (3 points). Finalist status will be recognized at half the points that winning the award would merit.
Academic presentations in peer-reviewed, or selective conferences	Capped at 1.5	Typically 0.5 point per presentation. Original research, prestige and selectiveness of the venue should be considered in this evaluation. 1.5 points should only be reserved for engagements such as being a keynote speaker in an academic conference
Book review	Capped at 1	0.5 per review, but prestige/selectiveness of the publisher, complexity of the text may be considered. A literature review may be considered a journal article.
Article or book manuscript submitted and under review	Capped at 2.5	0.25 to 0.75 (according to tiers) for the submission of an article to a peer-reviewed journal. 1 to 2 points (according to complexity and prestige of venue) for the submission of a book manuscript. The evaluation committee may agree to award no more than 0.25 or 0.5 points for a substantially revised article or book resubmission, respectively.
Research grant, awarded	Capped at 5	Only awarded grants receive points in this category. An extramural grant exceeding \$100,000, 3 points or more; extramural grant exceeding \$25,000, 2 points; extramural grant exceeding \$5,000, 1.5 points. A Fulbright or equivalent fellowship receives up to 2 points; other research fellowships may receive up to 1 point. A BGSU research grant may receive 0.5 points. Complexity, scope, prestige and co-authorship should be considered in the evaluation.
External grant, applied	Capped at 2	Typically 0.5 point awarded for grants with a university-approved budget. More or less points may be awarded according to the parameters used for awarded grants. Resubmissions with substantial revisions may receive as many points as a new submission.
Other evidence that in the judgment of the faculty	Capped at 1	The faculty member may include evidence of other aspects of their research program, such as manuscript

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member documents an active research program		progress, original archival research and other forms of dissemination not considered in this table that deserve to be evaluated.
Co-authored scholarship		A discount may take place based on the complexity of the product; the evaluation committee may request additional evidence that demonstrates equal standing in authorship.

<b>Merit Score (point allocation)</b>	<b>Definition and Description</b>
<b>Exceeds Expectations for Merit in Research</b>	3.6 to 6.0 points
<b>Meets Expectations for Merit in Research</b>	2.0 to 3.5 points
<b>Fails to Meet Expectations for Merit in Research</b>	1.0 to 1.9 points
<b>Unacceptable Performance in Research</b>	0 to 0.9 points  For a colleague's performance to be deemed unacceptable, all of the following must apply during the review period: <ul style="list-style-type: none"> <li>• No publications (neither under review, nor in press, nor in print)</li> <li>• No conference papers delivered</li> <li>• No evidence of an active research program</li> </ul>

**Merit Score for Research (to be completed by Evaluation Committee member): \_\_\_\_\_**

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**Service**

<b>Performance Indicators (description)</b>	<b>Maximum Rating per Indicator</b>	<b>Basis of the Evaluation Rating (criteria, evidence, etc.)</b>
Participation in a standing departmental committee	Capped at 2.5	1.5 points for regular participation and documented engagement in one of the standing departmental committees. An additional half-or one-point will be assigned for chairing or extraordinary responsibilities in the committee.
Membership on College/University committees or advisory boards	Capped at 2.5	2 points for membership (2.5 for leadership) in a major college or university standing committee (e.g. Undergraduate Council, PTRC). 0.5 for participation in the advisory board of a program or a minor university role (e.g. faculty senator). An ad-hoc university or college committee may be equated to a minor or a major responsibility based on provided documentation.
Special departmental responsibilities	Capped at 3	1.5 points for membership in faculty search committees (3 if conducted over the summer); 0.5 for other ad-hoc committees (exceptionally 1 point, if documented as service of medium to high intensity). 0.5 point for roles such as chair of said committees, liaison to external offices (library representative, marketing and communications), responsibilities with coordinating canvas, online presence, etc...
Participation in at least one recruitment or student-life event in representation of the department	Capped at 1.5	Typically 0.25 points for each recruitment or student-life events that the faculty member attended in representation of the department (e.g. preview days, commencement, history society or PAT meeting). May be increased for activities planned by the faculty member (e.g. field trip, lecture).
Service work for regional or national scholarly organizations (eg, the Ohio Academy of History, Society for Historians of the Early Republic)	Capped at 4	Typically 1 point for involvement in the governance in regional scholarly organizations, 2 points for involvement in national organizations, 3 or more points for involvement in a major national organization (e.g. the Organization of American Historians). An additional point will be given for a major leadership role in the said organization. Organizing, chairing, and commenting of panels receives 0.25 to 0.50 points depending on the venue.
Service to the discipline as manuscript reviewer for academic journals or presses, external reviewer	Capped at 2	Typical ratings are 0.25 point per article review, 0.5 for more complex reviewing (book manuscript review, editorial board, tenure review, grant panel).
Mentoring faculty members in the department or the university	Capped at 1	Typically 0.5 point for formalized mentorship assignments in the department, college or the

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		university as well as peer teaching observations (0.25 point).
Service work for regional or national public-oriented historical organizations	Capped at 4	1 point for playing a formalized role in a local history society or museum, 2 points or more points for roles in state and national organizations. Do not double count in public scholarship.
Engagement in the community and consulting in government agencies as a representative of BGSU	Capped at 2	Typically half to one point per instance. Examples may include representation in the BGSU-FA, interviews, involvement in student organizations, membership in examination review boards, etc. Do not double count in teaching or public scholarship.

*\*Insert score values on a scale that includes at least six numerical values, e.g., 1-6 point scale.*

<b>Merit Score (point allocation)</b>	<b>Definition and Description</b>
<b>Exceeds Expectations for Merit in Service</b>	3.6 to 6.0 points
<b>Meets Expectations for Merit in Service</b>	2.0 to 3.5 points
<b>Fails to Meet Expectations for Merit in Service</b>	1.0 to 1.9 points
<b>Unacceptable Performance in Service</b>	0 to 0.9 points  For a colleague's performance to be deemed unacceptable, all of the following must apply during the review period: <ul style="list-style-type: none"> <li>• Unexcused absences in faculty meetings.</li> <li>• No participation or attendance in program, departmental, college, or university committees.</li> </ul>

**Merit Score for Service (to be completed by Evaluation Committee member): \_\_\_\_\_**

Merit Committee Composition and the Election//Appointment Process

Members of the Evaluation Committee are elected for one-year terms by all eligible bargaining unit faculty members from the Department's faculty. The committee consists of three members; terms are staggered with one new member elected each year.

If an Evaluation Committee member cannot serve during any part of his/her term due to leave, illness, or other causes, the bargaining unit faculty members may elect a replacement for all or part of the time remaining in the Committee member's term.



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Additional Academic Unit Merit Policy Information

The typical allocation of effort for TTF in the department is 30% research, 50% teaching, and 20% service; and 80% teaching, 20% service for QRF. This allocation is assumed to be correct for all faculty members who do not confirm a different allocation with the Chair prior to the beginning of each academic year.

Approved by the Department of History by special vote on October 15, 2019.

  
Amílcar E. Chafú, Chair/Director

Date 10/21/2019

Approved:   
Raymond A. Craig, Dean of College of Arts and Sciences

Date 10/24/19

Approved:   
Joe B. Whitehead, Provost/Senior VP

Date 11/20/19

## Merit Policy

### Part II: Academic Unit Criteria, Standards, and Processes

#### Elements of the Merit Dossier

Each faculty member submits a complete merit dossier to be submitted electronically using the processes sanctioned by the Provost office. The dossier contains all of the following elements:

- (a) a report of all activities using the dossier format authorized by the Provost's office (e.g. Faculty 180);
- (b) a supplemental merit form specific to the History Department;
- (c) the department recommends to electronically attach copies for all published manuscripts, grant proposals, awards, and major service activities;
- (d) if documentation is not attached to the dossier, the Evaluation Committee or the Chair may require copies to be attached if deemed necessary to evaluate the faculty member's performance.

The Chair will provide to the Evaluation Committee:

- The review-period allocation of effort resulting from leaves, grant contracts and negotiated workload.
- The full record of student evaluations of the review period, including qualitative comments.
- Notice of any special circumstances, in particular faculty leaves, stated in Part I ("University-wide Policy"), section 4 of the Merit Policy

#### Calculation of Overall Merit Score

Separate evaluations are made in the areas of teaching, research, and service using 6-point scales with the following anchors: 0-0.9 (*unacceptable*); 1-1.9 (*no merit*); 2.0-3.5 (*meeting departmental expectations*); 3.6-6 (*exceeding departmental expectations*). The committee then meets and resolves any discrepancies in the independent evaluations of each faculty member on each scale. Agreement is achieved by consensus, if possible, vote if necessary. Committee members will absent themselves when their own merit is being reviewed, or for other conflicts of interest.

Merit points are assigned to each faculty member as the sum of the products of merit ratings in each of the three domains and allocation of effort in that domain. For purposes of determining merit, allocation of effort is translated to a tripartite scale whose elements sum to 1 point (e.g. a 50-30-20 allocation of effort becomes 0.5 [teaching], 0.3 [research], 0.2 [service]). The elements serve as weights, which when multiplied by the merit scores for each domain creates a scale with a theoretical ranges of 0 to 6 points for each faculty member. The formula is thus:

$$TP = M_T E_T + M_R E_R + M_S E_S$$

Where TP=total points, M=Merit rating within each domain, E=effort allocated to each domain, and T,R,S refer to teaching, research, and service.

If the allocation of effort varied during the review period, the mean of the allocations for each domain will be used as the multiplier. The three year moving average score will be calculated by averaging the current and last two year's overall merit scores.