

Merit Document
Department of Music Performance Studies
College of Musical Arts

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 in the following areas: Teaching, Research/Creative Work, and Service. Each faculty member will receive an overall merit score, which will identify whether s/he did not meet, met, or exceeded expectations for merit. The overall merit score will include five or more categories or rating levels to allow for greater discrimination among levels of performance; each of the categories or rating levels on the overall merit score must clearly identify whether it does not meet expectations for merit, meets expectations for merit, or exceeds expectations for merit. For example, using the minimum five categories or rating levels, the following evaluation concepts would be included: 1 = Does not meet expectations for merit; 2/3 = Meets expectations for merit; 4/5 = Exceeds expectations for merit.

Both the merit committee of the academic unit and the 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, 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 merit committee is responsible for assigning an overall merit score to every bargaining unit faculty member. The Performance Studies Merit Advisory Committee (PSMAC) shall consist of six members, one representative from each area (brass/percussion, jazz, keyboard, strings, voice, and woodwinds.) Area faculty members elect their representative to the PSMAC for a two-year, staggered term (incumbents are eligible.)

- 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: The MUSP Annual Merit Resume, area peer teaching evaluation scores, and quantitative student evaluation scores. Faculty may submit additional documentation if desired (e.g. course syllabi, enrollment/retention data, instructional development materials). Area peer teaching evaluations and student evaluations are provided to the PSMAC by the chair.
- 2.5. Using a 10-point scale, each member of the PSMAC records individual ratings for Teaching, Research/Creative Work and Service for each bargaining unit faculty member. The PSMAC chair averages the individual ratings to arrive at the component merit score for each performance area. The overall merit score is computed using a simple formula taking into account the weighted allocation of effort for each performance area:

$$[\text{Teaching Component Merit Score} * .50] + [\text{Research/Creative Work Component Merit Score} * .35] + [\text{Service Component Merit Score} * .15] = \text{Overall Merit Score}$$

Overall Merit Score	Interpretation (assumes component performance ratings made on 10-point scale)
0	Failure to submit merit materials. No merit
1-4	Fails to meet basic expectations for merit; Recommendation for no merit
5-6	Meets basic expectations for merit; Eligible for merit
7-8	Exceeds expectations for merit; Eligible for merit
9-10	Greatly exceeds expectations for merit; Eligible for merit

The department chair completes his/her independent evaluation of Teaching, Research/Creative Work, and Service for each bargaining unit faculty member in a similar manner.

- 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 of 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'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. 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.

6. Additional Information

The Chair must inform the PSMAC in writing of any faculty members who are assigned an allocation of effort differing from the normal percentages. Likewise, members of the PSMAC must take these variances into consideration in their evaluations.

Eligibility for merit pay requires merit scores that meet expectations all categories (Teaching, Research/Creative Work, and Service).

Approved by the Department of Music Performance Studies at the February 11, 2015 Faculty Meeting



William B. Mathis, Chair

Date 2/13/15

Approved:



Jeffrey Showell, Dean of College Musical Arts

Date 2-13-15

Approved:



Rodney Rogers, Provost/ Senior VP

Date 2/27/15

APPENDIX A - Merit Criteria, Performance Indicators and Expectations, and Calculation of Component Merit Scores

Overview

Merit will be based on meeting or exceeding departmental performance expectations in the following categories: Teaching, Research/Creative Work, and Service. Each category will be evaluated using a number of performance indicators, which are specifically detailed in the MUSP Retention, Promotion, and Tenure document. Minimum criteria in each category to meet departmental expectations are listed below.

Using a 10-point scale, each member of the PSMAC records individual ratings for Teaching, Research/Creative Work and Service for each bargaining unit faculty member. The PSMAC chair averages the individual ratings to arrive at the component merit score for each performance area. The overall merit score is computed using the formula described in section 2.5.

The department uses four levels in the evaluation of merit: greatly exceeds expectations, exceeds expectations, meets expectations, and fails to meet expectations. The department acknowledges that members of the PSMAC will use the following descriptions of the four levels as a general guide and will rely on their professional expertise and judgment in assigning numerical ratings for each category.

Greatly exceeds expectation for merit: Activities that cumulatively exceed expectations and reflect a clear and *extraordinary* level of accomplishment beyond what is normal for an individual with a given faculty rank in the department and discipline.

Exceeds expectations for merit: Activities that cumulatively exceed expectations and reflect a clear level of accomplishment beyond what is normal for an individual with a given faculty rank in the department and discipline.

Meets expectations for merit: Activities that cumulatively meet expectations and reflect standard levels of performance for the department and discipline.

Fails to meet expectations for merit: Activities that cumulatively do not meet expectations and fall below the standard levels of performance for the department and discipline.

Note: Eligibility for merit pay requires merit scores that meet expectations all categories (Teaching, Research/Creative Work, and Service).

TEACHING

Evaluation Rating Category	TEACHING Expected levels of accomplishment in Teaching (refer to performance indicators in MUSP Retention, Promotion, and Tenure document)	Possible Merit Score for Teaching
Greatly exceeds expectations for merit	Demonstration of teaching effectiveness that cumulatively exceed expectations and reflect a clear and <i>extraordinary</i> level of accomplishment beyond what is normal for an individual with a given faculty rank in the department and discipline.	9-10
Exceeds expectations for merit	Demonstration of teaching effectiveness that cumulatively exceed expectations and reflect a clear level of accomplishment beyond what is normal for an individual with a given faculty rank in the department and discipline.	7-8
Meets expectations for merit	To meet department minimum criteria in teaching, faculty must demonstrate the following: <ol style="list-style-type: none"> 1. A combined average of all courses taught in the calendar year of 4.00 or higher. 2. Peer teaching reviews at medium or high ratings. 3. Demonstrate effective activity in at least three of the following performance indicators <ul style="list-style-type: none"> - Record of graduate teaching - Course documentation (syllabi, learning outcomes, special projects, etc.) - Student achievements - Student enrollment and retention data/ Recruiting - Instructional development 	5-6
Fails to meet expectations for merit	Fails to meet the minimum criteria listed above in Meets Expectations for Merit.	1-4

RESEARCH/CREATIVE ACTIVITY

There are differing levels of importance, academic depth, and prestige associated with the various types of research/creative activity that are recognized by the Department. A three-tiered model is used to categorize faculty professional activities. The three-tiered model is listed in **Appendix B**.

Evaluation Rating Category	RESEARCH/CREATIVE WORK Expected levels of accomplishment in Research/Creative Work (refer to performance indicators in MUSP Retention, Promotion, and Tenure document)	Possible Merit Score for Research
Greatly exceeds expectations for merit	Demonstration of research/creative work effectiveness that cumulatively exceed expectations and reflect a clear and <i>extraordinary</i> level of accomplishment beyond what is normal for an individual with a given faculty rank in the department and discipline.	9-10
Exceeds expectations for merit	Demonstration of research/creative work effectiveness that cumulatively exceed expectations and reflect a clear level of accomplishment beyond what is normal for an individual with a given faculty rank in the department and discipline.	7-8
Meets expectations for merit	Demonstration of effective activity in at least one of the following ways. <ol style="list-style-type: none"> 1. One activity in Tier 1 and at least five additional activities from any tier. 2. Three activities in Tier 2 and at least five additional activities from any tier. 3. Two activities in Tier 2 and at least eight additional activities from Tier 3. 	5-6
Fails to meet expectations for merit	Fails to meet the minimum criteria listed above in Meets Expectations for Merit or combined output consists solely of Tier 3 activity.	1-4

SERVICE

Evaluation Rating Category	SERVICE Expected levels of accomplishment in Service (refer to performance indicators in MUSP Retention, Promotion, and Tenure document)	Possible Merit Score for Service
Greatly exceeds expectations for merit	Demonstration of service effectiveness that cumulatively exceed expectations and reflect a clear and <i>extraordinary</i> level of accomplishment beyond what is normal for an individual with a given faculty rank in the department and discipline.	9-10
Exceeds expectations for merit	Demonstration of service effectiveness that cumulatively exceed expectations and reflect a clear level of accomplishment beyond what is normal for an individual with a given faculty rank in the department and discipline.	7-8
Meets expectations for merit	<p>Demonstration of active involvement in item 1 and at least two separate activities from the items 2-5.</p> <ol style="list-style-type: none"> 1. Recruitment activity to include, but limited to, high school visits, clinics, Summer Music Institute, sample lessons to prospective students, service to OMEA, and other activities in professional venues where secondary music teachers or prospective students are present. 2. Appointment/election and service on Departmental Committees 3. Appointment/election and service on College Committees 4. Appointment/election and service on University Committees 5. Special projects by assignment from Chair or Dean 6. Professional Service 	5-6
Fails to meet expectations for merit	Fails to meet the minimum criteria listed above in Meets Expectations for Merit.	1-4

SUMMARY FORM - To be completed each member of the PSMAC.

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

SUMMARY FORM - To be completed by PSMAC chair

Faculty Member	Average Teaching Merit Score (from PSMAC) * .50[^]	Average Research/Creative Work Merit Score (from PSMAC) * .35[^]	Average Service Merit Score (from PSMAC) *15[^]	Overall Merit Score (columns 2, 3, and 4 added together)
<i>Faculty member 1</i>	<i>Insert averaged score * allocation of effort</i>	<i>Insert averaged score * allocation of effort</i>	<i>Insert averaged score * allocation of effort</i>	<i>Total Score</i>
<i>Faculty member 2</i>	<i>Insert averaged score * allocation of effort</i>	<i>Insert averaged score * allocation of effort</i>	<i>Insert averaged score * allocation of effort</i>	<i>Total Score</i>
<i>Next faculty member, etc.</i>	<i>Insert averaged score * allocation of effort</i>	<i>Insert averaged score * allocation of effort</i>	<i>Insert averaged score * allocation of effort</i>	<i>Total Score</i>

[^]Multipliers are adjusted for faculty with alternative allocations of effort

Appendix B – MUSP Three-tiered Model

Tier 1	<p>Peer reviewed activity</p> <ul style="list-style-type: none"> - National/international performances - National/international festival/conference appearances - National/international presentations - Recording release - Publications (articles, books, compositions) - Research/performance grants - Adjudication 	<p>Peer reviewed activity implies an invitation from a significant professional entity (organization, institution, publication, etc.) to participate in the given activity. Reviews and/or assessment of the activity from professionals in the field also constitute peer review.</p> <p>Tier 1 activity is especially prestigious and significant, determined by the venue and audience or sponsoring organization.</p>
Tier 2	<p>Professional Activity on and off campus</p> <ul style="list-style-type: none"> - National/international, regional and selected local performances - FAS recitals - National/international festival/conference appearances - National/international presentations - Recording release - Publications (articles, books, compositions) - Research/performance grants - Adjudication at major events where is truly an honor to be invited 	<p>Significant professional activity that does not meet the standard for peer reviewed activity in Tier 1.</p> <p>Tier 2 activity is determined by venue and audience and typically will include:</p> <ul style="list-style-type: none"> • Activity that is initiated by the faculty member • Measured recruitment value (engagement with music teachers, schools, and potential students) • Activity resulting from a faculty member's professional reputation • Representing BGSU as faculty member

<p>Tier 3</p>	<p>Professional activity on and off campus</p> <ul style="list-style-type: none"> - Local and regional performances - Local/regional presentations 	<p>Professional activity that does not meet the standard for Tier 2.</p> <p>Tier 3 activity is determined by venue and audience that typically will include:</p> <ul style="list-style-type: none"> • Activity initiated by the faculty member or invitations from community based organizations • Unmeasured recruitment value (engagement with music teachers, schools, and potential students) • Representing BGSU as faculty member • Personal gain could be a primary factor in accepting invitation or not
<p>Below Threshold</p>	<p>Professional and/or Non-Professional Activity on and off campus</p> <ul style="list-style-type: none"> - Local and regional performances - Community outreach 	<p>Activity that does not meet the standard for Tier 3.</p> <p>This category includes activity that is considered primarily for personal gain or that falls into the category of Service.</p> <ul style="list-style-type: none"> - Gigs as freelance artist with little or no educational emphasis - Performances at public schools - Performances at SMI or other similar events - Social Events