Merit Policy

School of Teaching and Learning

Preamble

Merit raises refer to the component of salary raises that are provided to department/school bargaining unit faculty members who meet or exceed their assigned unit performance expectations. In any given year, it is possible that all of the Bargaining Unit Faculty Members in an academic unit may be eligible for merit salary raises. Merit is calculated during spring semester based on performance during the previous calendar year. Merit salary raises are added to base salary for the ensuing fiscal year (on September 1 for Bargaining Unit Faculty Members on 9-month contracts, and on July 1 for Bargaining Unit Faculty Members on 12-month contracts).

Merit eligibility for faculty members will be based on meeting or exceeding unit performance expectations for merit in the School of Teaching and Learning in the following areas: Teaching, Scholarly/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.

Both the merit committee of the academic unit and the director may make recommendations to the Dean for allocation of merit dollars and/or percentages. However, as provided for by Section 11.2 of Article 17 of the Collective Bargaining Agreement, the Dean is not bound by such recommendations and the determination of the actual merit increase is within the Dean's reasonable discretion.

1. Merit Criteria, Performance Indicators and Expectations, and Calculation of Merit Scores

The merit criteria (i.e., Teaching, Scholarly/Creative Work, and Service), performance indicators and expectations for the criteria, and the calculation of the component merit scores (i.e., Teaching, Scholarly/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 Director.

    2.2. In accordance with the STL Bylaws, merit review is conducted by the Personnel Committee. This group is responsible for assigning an overall merit score to every bargaining unit faculty member.

    2.3. The Personnel Committee is an elected group comprised of five faculty members who have been promoted and who are elected for alternating terms of two academic years. At least two members must be NTTF.

2.4. Each faculty member submits a complete merit dossier to the merit committee by January 31st (if a weekend, the next business day). 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).

2.5. The submitted merit dossier must include the following elements: a current (full) vitae (aligned with the established BGSU format and including a table that summarizes means for student evaluations for all courses, including summer, taught during the year under review), a completed Merit Worksheet (Appendix B), and supporting materials.

2.6. All merit materials will be independently reviewed by a minimum of two members of the STL Personnel Committee and assigned a score between 0 -7.0 for each of three categories: Teaching, Scholarly/Creative Work (TTF only), and Service. These scores will be weighted to according to the allocation of effort to determine the final merit score. For cases in which more than a 1.5 discrepancy exists between the two independent reviews, a third independent review will be conducted and factored into the final merit score.

2.7. An academic unit may report its merit score recommendation to no greater than one-tenth decimal place (for example, a unit using 1-7 categories or rating levels may assign a score of 3.1 or 5.9 but may not assign a score of 3.15 or 5.975).

3. Significant Dates for Merit Consideration and Appeals

January 31: Last date for faculty merit dossiers to be submitted to an academic unit. The merit committee of the academic unit is urged to work informally with all faculty being reviewed to resolve any factual or interpretive issues in advance of making recommendations to the Director.

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

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

March 31: Director's merit score recommendation to the Dean (with copies to the committee and faculty members).

April 7: Last date for faculty member to appeal the Director's merit score recommendation to the Dean (with copy to the Director). The faculty member may raise in any appeal to the Dean: (i) the Director's merit score recommendation, and (ii) only those aspects of the committee's recommendation that the faculty member has previously raised in the faculty member's appeal to the Director. Issues related to the committee's recommendation not raised previously with the Director (where the faculty member either knew or through the exercise of reasonable diligence should have known) are not preserved for appeal to the Dean, shall not be considered by the Dean, and shall not be the basis or grounds for any grievance by the BGSU-FA.

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

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

4. Special Circumstances
4.1. Consideration of Special Circumstances as Required by the Collective Bargaining Agreement
4.1.1. **Faculty Exchange Leave** (Article 21, Section II: subsection 1.7). Faculty members shall be entitled to full consideration for merit. The merit evaluations for the faculty members will include consultation with the host institution.
4.1.2. **Leaves with Extramural Salary Paid through the University Payroll System** (Article 21, Section III: subsection 1.3) Faculty members shall be entitled to full consideration for merit. The merit evaluations for the faculty members will include consultation with the sponsoring government agency or private foundation.
4.1.3. **Unpaid Leave - 100% time** (Article 21, Section IV: subsection 5). Faculty members will not be eligible for merit in any calendar year for which 100% unpaid leave was taken that is unrelated to Family Medical Leave. If related to Family Medical Leave, performance expectations for merit evaluations shall be prorated.
4.1.4. **Sick Leave** (Article 21, Section VIII: subsection 9.1). Performance expectations for merit evaluations shall be prorated for faculty members on sick leave for 40 or more days during the calendar year.
4.1.5. **Parental Leave** (Article 21, Section IX: subsection 3). Unit Faculty Member who takes parental leave under this Article will only be evaluated for performance during the time in which he or she was not on parental leave (including use of sick leave in addition to parental leave). Performance expectations for merit evaluations that are expressed quantitatively shall be prorated. The Department Chair's/School Director's evaluation shall include a description of the methods used for prorating.
4.1.6. **Partial Unpaid Leave – 50% time** (Article 21, Section X: subsection 3.3) Faculty members will not be eligible for merit in any calendar year for which 50% unpaid leave was taken that is unrelated to Family Medical Leave. If related to Family Medical Leave, performance expectations for merit evaluations shall be prorated.
4.1.7. **Faculty Improvement Leave** (Article 22, Section 7.3.3) Faculty members shall be entitled to full consideration for merit. The merit evaluations for the faculty members will include consideration of the report submitted to the President detailing accomplishments during the FIL.
4.2. Consideration of Other Special Circumstances.
4.2.1. **New Faculty Hires.** New faculty members whose employment begins in the fall semester shall be entitled to full consideration for merit. Performance expectations for merit evaluations shall be prorated.
4.2.2. The unit's faculty advisory body may also consider special circumstances not covered in 4.1 above and make a recommendation to the unit chair or director. Such exceptional circumstances might include a leave without pay to take a short-term research appointment, a leave without pay to participate in professional development, or other leave without pay that enhances the productivity of the faculty member and the reputation of the institution.

5. Amendment of Merit Policy

The unit faculty may amend performance indicators, performance expectations, and the methods for combining this information into both component and overall merit scores at any time. Amendments to

the merit policy must be approved by the Dean and Provost/SVPAA. Approved amendments to the merit policy shall not be applied retroactively in the calculation of the previous year's merit scores.

Approved by the School of Teaching and Learning at the February 10, 2015 Faculty Meeting

Date 3|5|15

Dawn Shinew, Director
School of Teaching and Learning

Approved: Date 3/5/15

W. Bradley Colwell, Dean
College of Education and Human Development

Approved: Date 3/8/15

Rodney Rogers, Provost/ Senior VP

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

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, Scholarly/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 Expected levels of accomplishment on teaching performance indicators (or their equivalent)	Possible Merit Score for Teaching

Exceeds expectations for merit	Exceeds expectations (# 1 required, with at least two or more additional criteria met):
	
	1. Results of student evaluations of courses taught that have a combined average of 4.0 or higher (considered "good" on a criterion-based reference and calculated by adding the overall course means for all courses, including summer, taught during the period under review and dividing by the total number of courses);
	2. One of the following:
	    A. Peer teaching observations and evaluations that indicate outstanding performance (required for reappointment for NTTF and probationary TTF);
	    B. Explanation and supporting evidence of specific innovations (including, but not limited to, integration of technology) in teaching;
		5.5 – 7.0

	C. Teaching awards and distinctions; D. Evidence of significant professional development activities (participation in workshops or activities over an extended period of time) targeted at improving one's teaching; E. Examples and descriptions of new course and/or program development; F. Descriptions of one or more independent studies, including name of student and course; G. Evidence of effective teaching in other, university-related contexts (positive evaluations from grant activities, community events, professional development activities in partner schools, etc.); H. Evidence of serving as a committee member on two or more masters' theses/projects (students' names and program areas); I. Evidence of serving as a committee chair on one or more graduate thesis/project/dissertation committees; J. Evidence of serving as an ACTION or Honors Project advisor.	

Meets expectations for merit	Meet expectations (# 1 required, with at least two or more additional criteria met):
	1. Results of course evaluations that have a combined average of 3.0 or higher (considered "acceptable" on a criterion-based reference and calculated by adding the overall course means for all courses, including summer, taught during the period under review and dividing by the total number of courses), with faculty retaining the right to attach explanations regarding low response rates or other issues that may skew results and warrant consideration;
	2. One of the following:
	    A. Peer teaching observations and evaluations that indicate outstanding performance (required for reappointment for NTTF and probationary TTF);
	    B. Explanation and supporting evidence of specific innovations (including, but not limited to, integration of technology) in teaching;
	    C. Teaching awards and distinctions;
	    D. Evidence of significant professional development activities (participation in workshops or activities over an extended period of time) targeted at improving one's teaching;
	    E. Examples and descriptions of new course and/or program development;
	    F. Descriptions of one or more independent studies, including name of student and course;
	    G. Evidence of effective teaching in other, university-related contexts (positive evaluations from grant activities, community events, professional development activities in partner schools, etc.);
	    H. Evidence of serving as a committee member on two or more masters' theses/projects (students' names and program areas);
	    I. Evidence of serving as a committee chair on one or more masters' thesis/project committees;
	    J. Evidence of serving as an ACTION or Honors Project advisor.
		2.5 – 5.4

Fails to meet expectations for merit	1. Did not meet expectations in all relevant area; 2. Results of course evaluations that have a combined average of 2.0 or lower (considered "unacceptable" on a criterion-based reference and calculated by adding the overall course means for all courses, including summer, taught during the period under review and dividing by the total number of courses), with faculty retaining the right to attach explanations regarding low response rates or other issues that may skew results and warrant consideration.	1.0 – 2.4
Not considered for merit	Failed to submit materials for merit review.	0

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

Comments:

Evaluation Rating Category	**SCHOLARLY/CREATIVE WORK** Expected levels of accomplishment on scholarly/creative work performance indicators (or their equivalent)	**Possible Merit Score for Research**

Exceeds expectations for merit	Exceeds expectations requires evidence of a successful research agenda. Indicators of a successful research agenda include #1, 2, and 3 below (required), with at least one additional criterion from those listed in #4 (A-G) *and* one additional criterion from those listed in #5 (H-L):
	
	1. Indication of progress on current research projects (status of data collection and/or data analysis);
	2. A minimum of one peer-reviewed presentation at a national, regional, or state level conference;
	3. Evidence of peer-reviewed manuscript under review or grant submission under review or sufficient progress on multi-year funded project;
	4. One of the following:
	  A. Peer-reviewed manuscript(s) published;
	  B. Publication of non-peer reviewed manuscript(s);
	  C. Copy of book contract(s);
	  D. Invited presentation(s);
	  F. Proposal(s) submitted for internal or external funding;
	  G. Published conference proceeding(s); AND
	5. One or more of the following:
	  H. Peer-reviewed article(s) published;
	  I. Peer-reviewed article in press;
	  J. Peer-reviewed book chapter(s);
	  K. Notification of grant award for internal or external funding;
	  M. Edited or authored book;
	  N. Editorship of a journal.
		5.5 – 7.0

Meets expectations for merit	Meets expectations requires evidence of an active research agenda. Indicators of an active research agenda include #1, 2, and 3 below, as well as evidence of at least one of the criteria listed in #4 (A-G):
	
	1. Indication of progress on current research project(s) (evidence of data collection and/or data analysis);
	2. A minimum of one peer-reviewed presentation at a national, regional, or state level conference;
	3. Evidence of peer-reviewed manuscript(s) under review or evidence of grant submission(s) under review or progress on multi-year funded project(s); and
	4. One of the following:
	  A. Peer-reviewed manuscript(s) published;
	  B. Peer-reviewed article in press;
	  B. Publication of non-peer reviewed manuscript(s);
	  C. Copy of book contract(s);
	  D. Invited presentation(s);
	  F. Proposal(s) submitted for internal or external funding;
	  G. Published conference proceeding(s).
		2.5 – 5.4

Fails to meet expectations for merit	Failing to meet expectations indicates no evidence of an active research agenda: 1. No indication of progress on current research projects (no evidence of data collection and/or data analysis); 2. No peer-reviewed presentation at a national, regional, or state level conference; 3. No evidence of peer-reviewed manuscript or grant submission under review provided.	*1.0 – 2.4*
Not considered for merit	Failed to submit materials for merit review.	*0*

Merit Score for Scholarly/Creative Work (to be completed by Merit Committee member): _____

Comments:

Evaluation Rating Category	SERVICE Expected levels of accomplishment on service performance indicators (or their equivalent)	Possible Merit Score for Service

Exceeds expectations for merit	Exceeds expectations includes #1, 2, and 3 below (all required), with at least one additional criterion from those listed in #4 (A-K):
	1. Active participation in one of each of STL's committees (Program and/or Content and Operating);
	2. Active participation in one EDHD or University Committee and/or EDHD or University-sponsored activities (Literacy/STEM in the Park, Recruitment or Retention events, etc.)
	3. Evidence of individual and/or group advising (screen shot from myAdvisees in MYBGSU); AND
	4. One of the following:
	    A. Leadership on one or more STL, EDHD, or University Committees;
	    B. Active participation in additional STL, EDHD, or University Committee(s);
	    C. Involvement in state or national curriculum initiative;
	    D. Paid or unpaid consultancies or workshops;
	    E. Service and/or leadership in state or national professional organizations;
	    F. Role as a peer mentor for tenure and/or promotion;
	    G. Advisor for student organizations;
	    H. Primary role in developing and/or sustaining Professional Development and/or Partner Schools or other business organizations;
	    I. Leadership role in University-related event;
	    J. Submission of NCATE reports;
	    K. Community service related to area of expertise and/or in which one serves as a representative of the school, college, or university.
		5.5 – 7.0

Meets expectations for merit	Meets expectations (#1, 2, and 3 required). Evidence of satisfactory engagement in the unit, includes: 1. Active participation in one of each of STL's committees (Program and/or Content and Operating); 2. Active participation in one EDHD or University Committee and/or EDHD or University-sponsored activities (Literacy/STEM in the Park, Recruitment or Retention events, etc.); AND 3. Evidence of individual and/or group advising (screen shot from myAdvisees in MYBGSU).	2.5 – 5.4
Fails to meet expectations for merit	Fails to meet expectations for merit indicates limited or no activity in the area of service: 1. Limited or no participation in one of STL's committees; 2. Limited or no participation in one EDHD or University Committee. 3. No evidence of individual and/or group advising.	1.0 – 2.4
Not considered for merit	Failed to submit materials for merit review.	0

Merit Score for Service (to be completed by Merit Committee member): _____
Comments:

SUMMARY FORM

To be completed independently by two peer reviewers. The score for each category will then be weighted based on the allocation of effort designated for each area. For cases in which more than a 1.5 discrepancy exists between the two independent reviews, a third independent review will be conducted and factored into the final merit score.

Tenure Track Faculty Member	Merit Score for Teaching (x 50%)	Merit Score for Scholarly/ Creative Work (x 30%)	Merit Score for Service (x 20%)	Overall Weighted Score (sum of each score multiplied by % of effort)
Faculty member 1	*Insert numerical score*	*Insert numerical score*	*Insert numerical score*	
Faculty member 2	*Insert numerical score*	*Insert numerical score*	*Insert numerical score*	
Next faculty member, etc.	*Insert numerical score*	*Insert numerical score*	*Insert numerical score*	

Non-Tenure Track Faculty Member	Merit Score for Teaching (x 80%)	Merit Score for Service (x 20%)	Overall Weighted Score (sum of each score multiplied by % of effort)
Faculty member 1	*Insert numerical score*	*Insert numerical score*	
Faculty member 2	*Insert numerical score*	*Insert numerical score*	
Next faculty member, etc.	*Insert numerical score*	*Insert numerical score*	

*Unless otherwise noted, merit scores will be calculated using a 50% Teaching, 30% Scholarship, and 20% Service for Tenure Track Faculty and 80% Teaching and 20% Service for Non-Tenure Track Faculty.

Overall Merit Score	Description
5.5 - 7	Based on the evidence provided, the peer review process determines the faculty member "exceeds expectations" for merit in a majority of his or her work.
2.4-5.4	Based on the evidence provided, the peer review process determines the faculty member "meets expectations" for merit in a majority of his or her work.
1.0-2.4	Based on the evidence provided, the peer review process determines the faculty member "fails to meet expectations" for merit in a majority of his or her work.
0	The faculty member failed to submit materials for merit review.

Approved by STL Faculty 2/10/15. Revised 3/5/15 per Provost request.

Appendix B
School of Teaching and Learning
Faculty Merit Worksheet

Faculty Member's Name: _____

Position: _____Year Under Review: _____

Allocation of Effort: Teaching_____%   Scholarship_____%   Service_____%

Special circumstances for consideration (Faculty Exchange Leave, Leaves with Extramural Salary Paid through the University Payroll System, Unpaid Leave, Sick Leave, Parental Leave, or Faculty Improvement Leave) and dates impacted:

_____

Attach an updated, BGSU-format vita that includes "works in progress" (where relevant to merit review) and a chart at the end that summarizes the courses taught during the last year (including semester taught, course number and title, number of students, and the mean of student evaluations). Please additional materials where indicated.

Part I TEACHING:

Self-Evaluation (Circle one and provide comments):

No Submission	Below Expectations	Meets Expectations	Exceeds Expectations
0	1 – 2.4	2.5 - 5.4	5.5 - 7.0

Comments (optional):

Please indicate which of the following additional criteria should be considered in the area of teaching (highlight relevant sections in BGSU-formatted vita and provide additional evidence only as necessary):

_____ Results of student evaluations, including combined average of all courses;
_____ Explanation and supporting evidence of specific innovations (including, but not limited to, integration of technology) in teaching;
_____ Peer teaching observations and evaluations that indicate outstanding performance;
_____ Teaching awards and distinctions;
_____ Evidence of significant professional development activities (participation in workshops or activities over an extended period of time) targeted at improving one's teaching;
_____ Examples and descriptions of new course and/or program development;
_____ Descriptions of one or more independent studies, including name of student and course;
_____ Evidence of effective teaching in other, university-related contexts (positive evaluations from grant activities, community events, professional development activities in partner schools, etc.);
_____ Evidence of serving as a committee member on two or more masters' theses/projects (students' names and program areas);

Approved by STL Faculty 2/10/15. Revised 3/5/15 per Provost request.

_____ Evidence of serving as a committee chair on one or more masters' thesis/project committees;
_____ Evidence of serving as an ACTION or Honors Project advisor.

Part II SCHOLARSHIP (Not applicable to Non-Tenure Track Faculty):

Self-Evaluation (Circle one and provide comments):

No Submission	Below Expectations	Meets Expectations	Exceeds Expectations
0	1 – 2.4	2.5 - 5.4	5.5 - 7.0

Comments (optional):

Please indicate which of the following additional criteria should be considered in the area of scholarship:

_____ Indication of progress on current research projects (include brief description of current status of data collection and/or data analysis, no more than 250 words);
_____ Peer-reviewed presentation(s) at a national, regional, or state level conference;
_____ Peer-reviewed manuscript or grant submission under review;
_____ Peer-reviewed manuscripts in press;
_____ Publication of non-peer reviewed manuscripts;
_____ Copy of book contract;
_____ Invited presentations;
_____ Proposals submitted for internal or external funding;
_____ Published conference proceedings;
_____ Peer reviewed journal article(s) published;
_____ Peer-reviewed book chapter(s) published;
_____ Grant submission for internal or external funding;
_____ Notification of grant award for internal or external funding;
_____ Edited or authored book;
_____ Editorship of a journal.

PART III SERVICE:

Self-Evaluation (Circle one and provide comments):

No Submission	Below Expectations	Meets Expectations	Exceeds Expectations
0	1 – 2.4	2.5 - 5.4	5.5 - 7.0

Comments (optional):

Please indicate which of the following additional criteria should be considered in the area of service:
_____ Active participation in one of each of STL's committees (Program, Content, and Operating);
_____ Active participation in one EDHD or University Committee and/or College or University-sponsored activities;
_____ Evidence of individual and/or group advising (screen shot from myAdvisees in MYBGSU);

Approved by STL Faculty 2/10/15. Revised 3/5/15 per Provost request.

_____ Leadership on one or more STL, EDHD, or University Committees;
_____ Involvement in state or national curriculum initiative;
_____ Paid or unpaid consultancies or workshops;
_____ Service and/or leadership in state or national professional organizations;
_____ Role as a peer mentor for tenure and/or promotion;
_____ Advisor for student organizations;
_____ Primary role in developing and/or sustaining Professional Development and/or Partner Schools or other business organizations;
_____ Leadership role in University-related event;
_____ Submission of NCATE reports;
_____ Community service related to area of expertise and/or in which one serves as a representative of the school, college, or university.

PART IV OVERALL SELF-EVALUATION FOR MERIT:

Overall Self-Evaluation (Circle one and provide comments):

No Submission	Below Expectations	Meets Expectations	Exceeds Expectations
0	1 – 2.4	2.5 - 5.4	5.5 - 7.0

Comments (optional):

Interactive Read-Aloud Reflection
EDTL 3100

Name _____ Date of Reading _____
Book Title, Author, Illustrator _____
_____
Group Size _____ Setting _____

Reflect on the effectiveness of your questioning, as well as your oral reading fluency including expressiveness.

1.   How did your read-aloud go? How effective were your questions in terms of engaging your listeners and helping them comprehend?

2.   How could you improve your questioning? Explain one or more of the following by giving 2-3 question(s) and explaining your decision(s).

        Which questions ...

                - did you add or delete? Why?
                - could be improved? Why? How?
                - do you wish you had asked? Why? How?

3.   What qualities did you notice about your oral reading fluency, in terms of what you did well and/or what you would like to improve?