

# Merit Document

## Department of Library Teaching & Learning, University Libraries

### 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: Librarian Effectiveness, Scholarship/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. Librarian Effectiveness, Scholarship/Creative Work, and Service), performance indicators and expectations for the criteria, and the calculation of the component merit scores (i.e., Librarian Effectiveness, Scholarship/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 librarian effectiveness, scholarship, and service) with the chair if different than the standard 70% Librarian Effectiveness, 20% Scholarly/Creative Work and 10% Service.
- 2.2. The departmental merit committee is responsible for assigning an overall merit score to every bargaining unit faculty member. The merit committee will consist of all Bargaining Unit Faculty within Library Teaching & Learning (LTL). Additionally, there will be two members who will serve as coordinators of the merit process for the merit year. This responsibility will rotate in alphabetical order. Each coordinator will serve a staggered two year term. Bargaining Unit Faculty Members, in this set of procedures, will refer to both tenure-track and non-tenure-track faculty members in the Department of Library Teaching and Learning, unless otherwise stated.

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:

- Annual Data Outline
- Position Description
- Allocation of Effort (only if the Allocation is different than the standard 70% Librarian Effectiveness, 20% Scholarly/Creative Work and 10% Service) A copy of the official letter approving the adjusted Allocation of Effort should be included.
- Documentation of Special Circumstances (See section 4). Include type of circumstance, length of time taken & dates.
- Copies of (or links to) publications during the calendar year.

The Bargaining Unit Faculty Member submits sufficient copies for each committee member to the merit coordinators and will also give two copies of each of these documents to the department chair, one of which will be forwarded to the Dean of University Libraries.

The Merit Coordinators will ensure that each Committee Member receives a set of LTL Merit Criteria & Performance Indicators Rubric & Merit Evaluation Sheets for each of the other LTL faculty members (see Appendix A). Each Bargaining Unit Faculty Member will use the LTL Merit Criteria & Performance Indicators Rubric to complete a Merit Evaluation Sheet for each of the other Bargaining Unit Faculty Members in LTL, assigning a score from 1 to 5 for each criterion (Librarian Effectiveness, Scholarly/Creative Work, and Service), using the associated performance indicators to guide the scoring. Completed Merit Evaluation Sheets will be submitted as instructed by the Merit Coordinators.

*A Bargaining Unit Faculty Member who does not complete and submit an LTL Merit Evaluation Sheet for each of the other LTL Bargaining Unit Faculty Members is considered to not meet expectations for merit.* The Merit Coordinators are responsible for reporting this to the Chair of the Department of Library Teaching and Learning. An exception to this policy for cases of extended illness or other exceptional reasons will be determined by the Chair.

2.5 The overall merit score will be calculated by the Merit Coordinators using the Weighted Allocation of Effort Algorithm (see Appendix B). Allocation of effort is taken into account when determining overall merit score. Final merit scores will range between 1 and 5, with a score of 1 – 1.4 indicating Does Not Meet Expectations; 1.5 – 3.4 indicating Meets Expectations, and 3.5 – 5 indicating Exceeds Expectations.

- The merit coordinators will submit merit scores to LTL Bargaining Unit Faculty Members using the LTL Faculty Merit Ranking Summary form found in Appendix C. The merit coordinators will transmit merit scores using the LTL Faculty Merit Report from Appendix D to the LTL chair.
- The LTL Chair will independently evaluate LTL Bargaining Unit Faculty Members following the LTL Merit Criteria & Performance Indicators Rubric Sheets (Appendix A) and the weighted Allocation of Effort Algorithm (Appendix B). LTL Chair will inform each Bargaining Unit Faculty Member of his or her evaluation from the Chair.

The LTL Chair and Merit Coordinators will ensure that all forms used in the merit process are submitted to the UL Dean’s Office to be held in compliance with the applicable record retention policy.

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

3. Significant Dates for Merit Consideration and Appeals

**January 31:** Last date for faculty merit dossiers to be submitted to an academic unit.

The merit committee of the academic unit is urged to work informally with all faculty being reviewed to resolve any factual or interpretive issues in advance of making recommendations to the chair.

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

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

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

**April 7:** Last date for faculty member to appeal the chair's merit score recommendation to the Dean (with copy to the chair). The faculty member may raise in any appeal to the Dean: (i) the chair'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 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

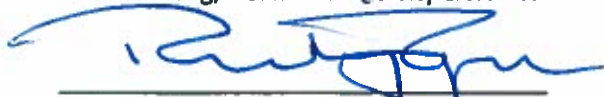
The unit faculty may amend performance indicators, performance expectations, and the methods for combining this information into both component and overall merit scores at any time. Amendments to the merit policy must be approved by the Dean and Provost/SVPAA. Approved amendments to the merit policy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

6 Additional Information (None)

Approved by the Department of Library Teaching & Learning Faculty at the March 11, 2015 Meeting.

 Date 3/12/15  
Linda Rich, Chair

Approved:  Date 3/17/15  
Sara Bushong, Dean of University Libraries

Approved:  Date 4/3/15  
Rodney Rogers, Provost/ Senior VPAA

## **APPENDIX A**

### **Merit Criteria, Performance Indicators and Expectations, and the Calculation of Component Merit Scores**

Merit criteria are limited to three areas: 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 is combined to calculate the relevant component merit scores (i.e., Librarian Effectiveness, Research/Creative Work, and Service).

#### **Overview**

Merit will be based on meeting or exceeding unit performance expectations that are assigned to the department member on the following performance criteria: Librarian Effectiveness, 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 (all LTL Bargaining Unit Faculty 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 submit component scores to Merit Coordinators who will calculate the average score for each faculty member to arrive at the final component score. The component scores may range in value from 1 to 5 and will 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 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.

#### **Librarian Effectiveness**

Due to a wide variety of assigned professional functions, activities and responsibilities, librarian effectiveness is evaluated according to a comprehensive set of relevant criteria including, but not limited to: teaching activities such as library instruction, credit courses, individual reference and consultation services, research clinics, and local training workshops; liaison responsibilities for instruction, collection development/management (e-resources/print) and the institutional repository; outreach activities; preservation activities; cataloging and metadata creation; and leadership responsibilities for coordinators. As some positions necessitate service on particular committees and task forces, service of this type will be evaluated as Librarian Effectiveness.

The following criteria apply to all librarians within LTL as appropriate to each individual position description and Allocation of Effort. Faculty members shall be evaluated separately for each area (Librarian Effectiveness, Scholarly/Creative Work, & Service).

The adverb "effectively" refers to both the overall success in conveying appropriate information and building appropriate skills, and demonstrable effort in attaining such success. Thus, a faculty member may demonstrate the effectiveness of his or her library instruction with evidence showing success (e.g. student comments on evaluations, assessment results, peer reviews of teaching by colleagues), and (if needed) with evidence showing the kind and quality of effort he or she has made (e.g. e-mails sent to

faculty offering instruction services, a portfolio of teaching materials, a discussion of special problems faced).

Evaluation Rating Category	<p align="center"><b>LIBRARIAN EFFECTIVENESS</b></p> <p align="center">Expected levels of accomplishment on librarian effectiveness performance indicators in the six areas below</p>	Possible Merit Score for Teaching*
<b>Reference Services</b>	Provides in-person and virtual reference service, including but not limited to the Jerome Library Research & Information Desk, including evening and weekend shifts as assigned.	
Exceeds expectations for merit	<p>In addition to requirements under Meets Expectations, exceptional performance can be demonstrated by one or more of the following (or the equivalent):</p> <ul style="list-style-type: none"> <li>• Routinely picks up extra reference responsibilities as needed for illness or unexpected absences.</li> <li>• Routinely provides exceptional reference assistance by: following up with students when off the desk; assisting other librarians with difficult patron questions; locating resources beyond student expectations; and using subject knowledge not commonly possessed by colleagues.</li> <li>• Takes a leadership role in a project or activity related to reference services.</li> </ul>	3.5 – 5.0
Meets expectations for merit	<ul style="list-style-type: none"> <li>• Arrives on time and completes assigned shifts or makes arrangements for a substitute.</li> <li>• Is prepared for desk shifts (i.e. Read RefBlog &amp; emails)</li> <li>• Shares reference service information with colleagues and Information Desk Assistants.</li> <li>• Is prepared for (having read materials supporting agenda items), attends, and contributes to reference and departmental meetings.</li> <li>• Effectively responds to reference questions received via the IM service.</li> <li>• Effectively responds to in person reference questions received at the Research and Information Desk</li> <li>• Effectively responds to reference questions received via personal email and/or telephone.</li> <li>• Effectively teaches students how to find, use, and evaluate sources as appropriate during reference transactions.</li> <li>• Makes appropriate referrals to other UL personnel, service points &amp; collections.</li> <li>• Meets deadlines for departmental projects/requests for feedback and makes substantive contributions.</li> <li>• Provides oversight (training &amp; monitoring) of Information Desk Assistants while at the desk to help ensure excellent service.</li> <li>• Participates in special departmental projects and activities related to reference services.</li> </ul>	1.5 – 3.4

	<ul style="list-style-type: none"> <li>Participates in selection and collection maintenance of print and digital reference materials.</li> </ul>	
Fails to meet expectations for merit	<ul style="list-style-type: none"> <li>Does not satisfy the requirements for Meets Expectations.</li> </ul>	1.0 – 1.4
<b>Instruction Services</b>	Participation in teaching activities where appropriate, including, but not limited to: library instruction; individual research appointments and consultation services; local training workshops; instructor of record responsibilities; student advising; and dissertation/thesis advising.	
Exceeds expectations for merit	<p>In addition to requirements under Meets Expectations, can be demonstrated by one or more of the following (or the equivalent):</p> <ul style="list-style-type: none"> <li>Develops innovative teaching strategies for use in instruction sessions</li> <li>Demonstrates commitment to student learning through regular substantive assessment and responds to opportunities for improvement.</li> <li>Develops new relationships with departmental faculty, leading to new collaborations.</li> <li>Instructor of record for a credit-bearing course.</li> <li>Assumes additional instructional responsibilities as needed.</li> </ul>	3.5 – 5.0
Meets expectations for merit	<p>Acceptable performance is typically demonstrated by the following (or the equivalent):</p> <ul style="list-style-type: none"> <li>Reaches out to department faculty regularly to inform them of library services and liaison functions.</li> <li>Provides effective library instruction to assigned departments or constituencies.</li> <li>Collaborates with classroom faculty to develop a meaningful library instruction experience.</li> <li>Develops effective instructional materials.</li> <li>Participates in library instruction initiatives and programs such as Intensive Individual Research Appointments, Graduate Student Orientation and General Studies Writing.</li> <li>Being prepared for (having read materials supporting agenda items), attending, and contributing to instruction meetings.</li> </ul>	1.5 – 3.4
Fails to meet expectations for merit	<ul style="list-style-type: none"> <li>Does not satisfy the requirements for Meets Expectations.</li> </ul>	1.0 – 1.4
<b>Campus Engagement</b>	Active involvement in academic activities throughout the university. Building relationships and partnering with classroom faculty in a wide variety of ways. Performance indicators within campus engagement will frequently overlap with performance indicators for other criteria within Librarian Effectiveness as well as within Service and Scholarly/Creative Work.	
Exceeds expectations for merit	<p>In addition to requirements under Meets Expectations, can be demonstrated by one or more of the following (or the equivalent):</p> <ul style="list-style-type: none"> <li>Pursuing development of new, or strengthens existing, liaison relationships or proactively works to adjust collections to departmental needs.</li> </ul>	3.5 – 5.0

	<ul style="list-style-type: none"> <li>Collaborating with faculty on academic endeavors (e.g. jointly creating a new LibGuide (substantial content); establishing a new online journal in ScholarWorks; co-authoring a journal article; embedding a library presence within a Canvas course shell.)</li> <li>Leading a faculty learning community.</li> </ul>	
Meets expectations for merit	<p>Acceptable performance is typically demonstrated by the following (or the equivalent):</p> <ul style="list-style-type: none"> <li>Carries out liaison responsibilities in assigned teams, such as Instruction, Collection Development, ScholarWorks, or Digital Initiatives.</li> <li>Subject team liaison responsibilities might include: responding to research and library queries and requests from faculty; maintaining established faculty relationships; attending departmental meetings and functions; informing faculty of new library resources and services.</li> <li>Additional engagement activities might include: participating in a faculty learning community; attending campus activities and events; participating in UL outreach and promotion efforts.</li> </ul>	1.5 – 3.4
Fails to meet expectations for merit	<ul style="list-style-type: none"> <li>Does not satisfy the requirements for Meets Expectations.</li> </ul>	1.0 – 1.4
<b>Collection Management</b>	Participation in activities related to the management of print and electronic resources.	
Exceeds expectations for merit	<p>In addition to requirements under Meets Expectations, can be demonstrated by one or more of the following (or the equivalent):</p> <ul style="list-style-type: none"> <li>Makes substantive contributions to the annual review of electronic resources.</li> <li>Maintains an awareness of resources relevant to the needs of departments within assigned subject teams and recommends for further review as appropriate.</li> <li>Assists with targeted or specialized collection management projects.</li> </ul>	3.5 – 5.0
Meets expectations for merit	<p>Acceptable performance is typically demonstrated by the following (or the equivalent):</p> <ul style="list-style-type: none"> <li>Participates in the annual review of electronic resources.</li> <li>Contributes to the ongoing review of recommended resources.</li> <li>Communicates faculty resource needs to the collection development team.</li> <li>Assists with collection management projects as needed and meets established deadlines.</li> </ul>	1.5 – 3.4
Fails to meet expectations for merit	<ul style="list-style-type: none"> <li>Does not satisfy the requirements for Meets Expectations.</li> </ul>	1.0 – 1.4
<b>Collaboration &amp; Communication</b>		
Exceeds expectations for merit	<p>In addition to requirements under Meets Expectations, can be demonstrated by the following (or the equivalent):</p> <ul style="list-style-type: none"> <li>Promotes/establishes new, or strengthens existing, collaborations within UL or the University.</li> </ul>	3.5 – 5.0



Meets expectations for merit	Acceptable performance is typically demonstrated by the following (or the equivalent): <ul style="list-style-type: none"> <li>Professional and effective interaction and collaboration with library faculty, staff, student assistants, and users.</li> </ul>	1.5 – 3.4
Fails to meet expectations for merit	<ul style="list-style-type: none"> <li>Does not satisfy the requirements for Meets Expectations.</li> <li>Evidence includes, but is not limited to, inability to work effectively with colleagues.</li> </ul>	1.0 – 1.4
<b>Professional Development/Continuous Improvement</b>		
Exceeds expectations for merit	In addition to requirements under Meets Expectations, can be demonstrated by one or more of the following (or the equivalent): <ul style="list-style-type: none"> <li>Regularly contributes to the improvement of departmental and library services, including through the incorporation of new technologies and software applications.</li> <li>Regularly improves effectiveness with knowledge gained from professional development activities and assessment.</li> </ul>	3.5 – 5.0
Meets expectations for merit	Acceptable performance is typically demonstrated by the following (or the equivalent): <ul style="list-style-type: none"> <li>Seeks to improve library services in relation to the goals and practices of LTL, UL, the University and the needs of users (e.g. attends workshops, views webinars, attends conferences).</li> <li>Stays abreast and makes use of new technologies and software applications in keeping with bullet above.</li> <li>Reads professional blogs, e-mail lists, literature, etc.</li> </ul>	1.5 – 3.4
Fails to meet expectations for merit	<ul style="list-style-type: none"> <li>Does not satisfy the requirements for Meets Expectations.</li> </ul>	1.0 – 1.4
<b>Program Coordinators</b>	In addition to the items in the previous list, the librarian effectiveness of Coordinators will be evaluated on the following criteria, <i>as appropriate to specific position descriptions</i> :	
Exceeds expectations for merit	<ul style="list-style-type: none"> <li>Develops and implements new programs and policies or significantly improves existing programs to enhance the unit's service and work effectiveness.</li> <li>Successfully advocates for the unit/function, leading to a significant program enhancement.</li> <li>Manages resources and operations of the unit/function in an exceptionally effective manner.</li> </ul>	3.5 – 5.0
Meets expectations for merit	<ul style="list-style-type: none"> <li>Maintains and assesses existing programs, policies, and procedures to continue and enhance the unit's service and work effectiveness</li> <li>Advocates for the unit/function and represents concerns to others within the department, UL and University</li> <li>Manages resources and operations of the unit/function in an effective manner.</li> </ul>	1.5 – 3.4
Fails to meet expectations for merit	<ul style="list-style-type: none"> <li>Does not satisfy the requirements for Meets Expectations.</li> </ul>	1.0 – 1.4

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

**Merit Score for Librarian Effectiveness\* (to be completed by merit committee member):**  
\_\_\_\_\_ (1.0 -5.0)

\*All components of Librarian Effectiveness should be considered in determining the overall Librarian Effectiveness Score. The following chart can be used (if desired) in assisting committee members in making this determination. The final score should not necessarily be a straight average of the components. This chart will not be turned into merit coordinators.

**Component Scores:**

Reference Services: \_\_\_\_\_

Instruction Services \_\_\_\_\_

Collection Development: \_\_\_\_\_

Collaboration & Communication \_\_\_\_\_

Professional Development/Continuous Improvement \_\_\_\_\_

Program Coordinator (if applicable) \_\_\_\_\_

Additional Responsibilities (if applicable) as listed in individual position descriptions \_\_\_\_\_

## Scholarship/Creative Work

The faculty member has met the criteria for research/creative work as listed below. Faculty members should maintain a record of their research/creative work that addresses the performance indicators used for evaluation.

Evaluation Rating Category	<b>SCHOLARSHIP/CREATIVE WORK</b> Expected levels of accomplishment on library effectiveness performance indicators (or their equivalent)	Possible Merit Score for Scholarship
Exceeds expectations for merit	Completes one or more of the following or completes one item from Meets Expectations and one of the following: <ul style="list-style-type: none"> <li>• publishes a professional academic book;</li> <li>• publishes a professional textbook;</li> <li>• publishes a professional article in a peer-reviewed academic journal;</li> <li>• publishes a chapter in a professional academic book;</li> <li>• presents two peer-reviewed sessions at state, regional or national conferences;</li> <li>• obtains an external grant of \$2,000 or more;</li> <li>• edits a book, journal issue, or entire journal;</li> <li>• serves as a grant reviewer/evaluator beyond the local level;</li> <li>• receives an award or recognition for exceptional scholarly products;</li> <li>• or the equivalent.</li> </ul>	3.5 – 5.0
Meets expectations for merit	Completes at least two of the following: <ul style="list-style-type: none"> <li>• organizes a conference or conference session;</li> <li>• chairs a panel;</li> <li>• serves as manuscript reviewer;</li> <li>• presents a poster session;</li> <li>• delivers a local lecture or presentation on ongoing research;</li> <li>• engages actively in ongoing research and writing (has a research plan);</li> <li>• presents at a conference;</li> <li>• publishes a professional article beyond the local level;</li> <li>• submits a grant application or secures a grant;</li> <li>• publishes a book review;</li> <li>• submits an academic article or book chapter for review or the equivalent.</li> </ul>	1.5 – 3.4
Fails to meet expectations for merit	Does not satisfy the requirements for Meets Expectations	1.0 – 1.4

Merit Score for Research (to be completed by merit committee member): \_\_\_\_\_ (1.0 -5.0)

## Service

The faculty member has given evidence of substantive service to University Libraries, BGSU or the profession at the local, state, national or international level. In presenting their records of service and contributions, faculty members should include examples of service which address the performance indicators used for evaluation. Faculty members are encouraged to lend their professional expertise to support community organizations, projects, and programs. However, for external community service to be considered for reappointment, tenure, or promotion considerations, such external activities must draw upon a faculty member's expertise and must be recognized by the department, college, or University as qualifying

Evaluation Rating Category	<b>SERVICE</b> Expected levels of accomplishment on service indicators:	Possible Merit Score for Service*
Exceeds expectations for merit	<ol style="list-style-type: none"> <li>1. Takes a leadership role in an important aspect of college or university governance or organization; for example, chairs a committee that rewrites and implements changes in general education, or the equivalent</li> <li>2. Takes a leadership role in a state or national professional organization, or functions in a central capacity in the publication of a professional journal, or the equivalent</li> <li>3. Serves on multiple committees that produce significant products and/or makes significant contributions.</li> </ol>	3.5 – 5.0
Meets expectations for merit	<ol style="list-style-type: none"> <li>1. Serves on a committee at the department, college or university level or the equivalent. Serves on a committee at the state, regional, national or international level.</li> <li>2. Chairs a committee at the department, college or university level or the equivalent at the state, regional, national or international level.</li> <li>3. Takes a leadership role in some aspect of university work (e.g. leading an assessment activity for the department)</li> <li>4. Performs some community or professional service related to professional expertise (e.g. catalogs a special library collection).</li> </ol>	1.5 – 3.4
Fails to meet expectations for merit	Does not satisfy the requirements for Meets Expectations	1.0 – 1.4

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

**Merit Score for Service (to be completed by merit committee member): \_\_\_\_\_ (1.0 -5.0)**

## LTL FACULTY MERIT EVALUATION SHEET

(To be completed by each merit committee member for each merit candidate)

Evaluatee: \_\_\_\_\_

Allocation of Effort:

Merit Score:

Librarian Effectiveness \_\_\_\_\_

Scholarly/Creative \_\_\_\_\_

Service \_\_\_\_\_

### SUMMARY FORM

(For use by Merit Coordinators):

<b>Faculty Member</b>	<b>Merit Score for Librarian Effectiveness</b>	<b>Merit Score for Research</b>	<b>Merit Score for Service</b>
<i>Faculty member 1</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>
<i>Next Faculty member</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>

## Appendix B

### Determining Overall Merit Score Recommendations

The individual component merit scores for librarian effectiveness, scholarly/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 a greater number of values or rating levels than seven, but it must clearly identify whether the overall merit rating reflects performance that fails to meet expectations, meets expectations, or exceeds expectations for merit.

Once the Merit Coordinators have averaged the component merit scores received from each committee member to arrive at the final "consensus" score, the overall merit score is computed using a simple algorithm taking into account the weighted allocation of effort for each performance area and adjusted for special circumstances if applicable.:

**[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 5-point scale)
1.0 – 1.4	Fails to meet basic expectations for merit; Recommendation for no merit
1.5 – 3.4	Meets basic expectations for merit; Eligible for merit
3.5 – 5.0	Exceeds expectations for merit; Eligible for merit

**Appendix C**

**LTL FACULTY MERIT RANKING SUMMARY**  
(Completed by Merit Coordinators)

Name of Faculty Member: \_\_\_\_\_

Merit Year: \_\_\_\_\_ Overall Merit Score\*: \_\_\_\_\_

	<b>Librarian Effectiveness</b>	<b>Scholarly/ Creative Work</b>	<b>Service</b>
<b>Final Averaged Scores</b>	<i>Insert score (average of evaluators' scores)</i>	<i>Insert score (average of evaluators' scores)</i>	<i>Insert score (average of evaluators' scores)</i>
<b>Evaluator #1</b>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>
<b>Evaluator #2</b>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>
<b>Evaluator #3</b>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>
<b>Evaluator #4</b>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>
<b>Evaluator #5</b>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>
<b>Evaluator #6</b>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>
<b>Evaluator #7</b>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>
<b>Evaluator #8</b>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>
<b>Evaluator #9</b>	<i>Insert numerical score</i>	<i>Insert numerical score</i>	<i>Insert numerical score</i>

<b>Overall Merit Score</b>	<b>Interpretation (assumes component performance ratings made on 5-point scale)</b>
1.0 – 1.4	Fails to meet basic expectations for merit; Recommendation for no merit
1.5 – 3.4	Meets basic expectations for merit; Eligible for merit
3.5 – 5.0	Exceeds expectations for merit; Eligible for merit

\* Overall Merit Score Calculated by using Weighted Allocation of Effort Algorithm

Appendix D:

**LTL FACULTY MERIT REPORT**  
 (Completed by Merit Coordinators & Submitted to LTL Chair)

<b>NAME</b>	<b>Merit Score 1-5</b>	<b>Does Not Meet Expectations</b>	<b>Meets Expectations</b>	<b>Exceeds Expectations</b>

<b>Overall Merit Score</b>	<b>Interpretation (assumes component performance ratings made on 5-point scale)</b>
1.0 – 1.4	Fails to meet basic expectations for merit; Recommendation for no merit
1.5 – 3.4	Meets basic expectations for merit; Eligible for merit
3.5 – 5.0	Exceeds expectations for merit; Eligible for merit