

School of Counseling, Higher Education, Leadership, and Foundations
College of Education and Human Development
Merit Policy
Part II: Academic Unit Criteria, Standards, and Processes

Merit Criteria, Performance Indicators, and Expectations

Evaluation Rating Category	<p style="text-align: center;">TEACHING</p> <p style="text-align: center;">Expected levels of accomplishment on teaching performance indicators</p> <p style="text-align: center;">See list of Primary and Secondary indicators below Table</p>	Merit Score for Teaching
Exceeds Expectations for Merit	<p><u>To achieve a score of 5:</u> High level of involvement in teaching activities:</p> <ul style="list-style-type: none"> • Quantitative Student Evaluations: 4.00 - 5.00 OR Quantitative Student Evaluations: 3.50 - 3.99 & Positive Peer Evaluation • Positive Qualitative Student Evaluations: all comments from 2 sections • 3 Secondary Indicators <p><u>To achieve a score of 4:</u> High level of involvement in teaching activities:</p> <ul style="list-style-type: none"> • Quantitative Student Evaluations: 4.00 - 5.00 OR Quantitative Student Evaluations: 3.5 - 3.99 & Positive Peer Evaluation • Positive Qualitative Student Evaluations: all comments from 2 sections • 2 Secondary Indicators 	4-5
Meets Expectations for Merit	<p><u>To achieve a score of 3:</u> Average level of involvement in teaching activities:</p> <ul style="list-style-type: none"> • Quantitative Student Evaluations: 3.50 - 3.99 • Positive Qualitative Student Evaluations: all comments from 2 sections • 1 Secondary Indicator <p><u>To achieve a score of 2:</u> Average level of involvement in teaching activities:</p> <ul style="list-style-type: none"> • Quantitative Student Evaluations: 3.50 - 3.99 • Positive Qualitative Student Evaluations: all comments from 2 sections 	2-3
Fails to Meet Expectations for Merit	<p><u>To achieve a score of 1:</u> Involvement in teaching activities:</p> <ul style="list-style-type: none"> • Quantitative Student Evaluations: 3.00 - 3.49 • 1 Secondary Indicator 	1
Unacceptable	No significant documented teaching effectiveness or no materials submitted review	0
	<p>Merit Score for Teaching (Completed by Merit Committee Member) (Assign whole number only and justify below a score that differs from the faculty member's reported score) Merit Committee Member Comments:</p>	

Evaluation Rating Category	SCHOLARLY/CREATIVE ACTIVITY Expected levels of accomplishment on scholarly/creative activity performance indicators See list of Primary and Secondary indicators below Table	Merit Score for Scholarly/Creative Activity
Exceeds Expectations for Merit	<p>To achieve a score of 5: High level of involvement in scholarly/creative activities</p> <ul style="list-style-type: none"> • 2 Primary Indicators <p>To achieve a score of 4: High level of involvement in scholarly activities</p> <ul style="list-style-type: none"> • 1 Primary Indicator & 2 Secondary Indicators 	4-5
Meets Expectations for Merit	<p>To achieve a score of 3: Average level of involvement in scholarly/creative activities:</p> <ul style="list-style-type: none"> • 1 Primary Indicator & 1 Secondary Indicator <p>To achieve a score of 2: Average level of involvement in scholarly/creative activities:</p> <ul style="list-style-type: none"> • 1 Primary Indicator 	2-3
Fails to Meet Expectations for Merit	<p>To achieve a score of 1: some involvement in scholarly/creative activities:</p> <ul style="list-style-type: none"> • 0 Primary Indicators • 1 submission of manuscript for peer review or 2 Secondary Indicators 	1
Unacceptable	No significant documented scholarly/creative or no materials submitted review	0
	<p>Merit Score for Scholarly/Creative Activity (Completed by Merit Committee Member) (Assign whole number only and justify below a score that differs from the faculty member's reported score) Merit Committee Member Comments:</p>	
Evaluation Rating Category	SERVICE Expected levels of accomplishment on service performance indicators See list of indicators below Table	Merit Score for Service
Exceeds Expectations for Merit	<p>To achieve a score of 5: One recruitment or retention-based initiative; regular participation in all required program, school, and college meetings; and 5 service indicators</p> <p>To achieve a score of 4: One recruitment or retention-based initiative; regular participation in all required program, school, and college meetings; and 4 service indicators</p>	4-5
Meets Expectations for Merit	<p>To achieve a score of 3: One recruitment or retention-based initiative; regular participation in all required program, school, and college meetings; and 3 service indicators</p> <p>To achieve a score of 2: One recruitment or retention-based initiative; regular participation in all required program, school, and college meetings; and 2 service indicators</p>	2-3

Fails to Meet Expectations for Merit	To achieve a score of 1: No recruitment or retention-based initiative and 1 service indicator	1
Unacceptable	No significant documented service or no materials submitted for review.	0
	Merit Score for Service (Completed by Merit Committee Member) (Assign whole number only and justify below a score that differs from the faculty member's reported score) Merit Committee Member Comments:	

	Teaching	Scholarly/Creative Activity	Service	Total Weighted Score
Committee Score				
Allocation of Effort				
Weighted Score				

Teaching

Primary Indicators:

Include brief description (1 sentence to 1 paragraph) and/or documentation

- Evaluations
 - Student quantitative evaluations
 - Student qualitative evaluation comments
 - Peer evaluations of teaching

Secondary Indicators

Indicators can be counted multiple times unless otherwise noted); include brief description (1 sentence to 1 paragraph) and/or documentation

- Self-evaluation of teaching and changes made to enhance teaching effectiveness
- Substantial course revisions, such as implementing innovative instructional techniques and/or refining and modifying a course
- Course revisions that address issues of inclusion and diversity (e.g., diverse identities of authors of assigned readings; specific modules, assignments, or class activities with focus on inclusion, diversity, equity, and antiracism; use of culturally responsive pedagogy; adjusting assignments, class activities, and/or materials to be accessible)
- Full approval for a new course, substantial course modification, new program, or substantial program modification
- Article, proceeding, and/or presentation pertaining to teaching (cannot also be used for scholarly/creative activity)
- Chair or committee member on completed program milestone (e.g., preliminary exam, dissertation proposal, dissertation defense) and/or culminating experiences

- Student advisement outside of the formal or assigned advisor role
- Advising for an undergraduate program
- Supervision of an independent study or other uncompensated teaching (e.g., directed readings/research)
- Professional development (PD) activity, such as attending a conference or workshop, taking a course, to enhance teaching skills (can only count one PD activity)
- Leadership in teaching (e.g., providing support to a colleague related to teaching, leading teaching workshops and/or demonstrations)
- Development and/or maintenance of positive relationships with students and/or advisees, including those related to diversity, equity, inclusion, and belonging
- Development and/or maintenance of positive, collaborative professional teaching-related relationships, with other instructors, staff, TAs, etc.
- Teaching award or distinction
- Evidence of teaching effectiveness that contributes to student success and/or institutional innovation (provide supporting evidence)

Scholarly/Creative Activity

Primary Indicators

Indicators can be counted multiple times unless otherwise noted; include brief description (1 sentence to 1 paragraph) and/or documentation

- A peer-reviewed journal article, book, book chapter, or creative product (document peer review process for books, book chapters, and creative products) accepted for publication (i.e., in press) or published
 - A publication counted as in press may not be counted again in a subsequent year when published
 - Manuscript submitted for publication that was under review in a previous merit submission may not be considered if listed as under review again.
 - A sole-authored scholarly book counts for two publications
- A competitive external research grant \geq \$15,000 per year

Secondary Indicators

Indicators can be counted multiple times unless otherwise noted; include brief description (1 sentence to 1 paragraph) and/or documentation

- Public facing research contribution
- Funded internal grant
- External grant < 15,000 or unfunded proposal
- Non-refereed academic book or book chapter (self-published manuscripts not acceptable)
- Published material such as book review, encyclopedia chapter, conference proceeding, or symposium
- Peer-reviewed and/or invited presentation at local, state, regional, national, or international conference
- Editor/associate editor of a peer reviewed journal (one indicator per issue published)
- Editor of a special issue of a peer reviewed journal
- Completed applied research through alliances/partnerships
- Research/scholarship award
- Evidence of contributions to public good through scholarly/creative activities (provide supporting evidence and explanation)

Service

Indicators (Indicators can be counted multiple times unless otherwise noted); include brief description (1 sentence to 1 paragraph) and/or documentation

- Graduate or Undergraduate Program Coordinator, including appointment to the EDHD Faculty Leadership Council and/or Graduate Council (these roles count for four indicators)
- Assistant Director, including appointment to the EDHD Faculty Leadership Council and/or Grad Council (this role counts for two indicators)
- Other administrative role, such as course coordinator or center director
- Active member or leader of school, college, university committee (standing or ad hoc), advisory board, Graduate Council, Faculty Senate, or task force
- Editorial board member or reviewer for professional books, journals, newsletters, conferences, or grants
- Speaker at workshop and/or engagements (e.g., keynote) related to the profession (cannot also be used for scholarly/creative activity)
- Active member or leader of professional association committee (this may include program reviewer service for accreditation purposes)
- Preparer/author/coordinator of accreditation report (e.g., SPA) for a degree program
- External reviewer for candidate for faculty advancement (e.g., tenure and/or promotion)
- Expert testimony and/or service to governmental agencies
- Service award
- Advisor for a student organization
- External community service relevant to person's career
- Evidence of contributions to the public good through service related to one's discipline (provide supporting evidence and explanation)

Merit Committee Composition and the Election Process

The Merit Committee and the school director are responsible for determining overall merit scores for every bargaining unit faculty member. Merit Committee members serve a two-year term, elected by school faculty. Two individuals from the Merit Committee will review each merit submission independently. At least one tenure-track member will review each TTF submission and at least one QRF member will review each QRF submission. Merit Committee members will recuse themselves when their spouse's/partner's merit is being reviewed.

Elements of the Merit Dossier

The submitted merit dossier must include the following elements:

1. Completed **Self-Filled Table of Meritorious Achievements** that documents achievements during the previous academic year (fall, spring, summer)
2. Current CV in BGSU format with activities during the previous academic year highlighted (Activities submitted for merit in prior years should not be highlighted and counted in subsequent year, e.g., an article still in press from one year to the next)
3. Completed table of **Quantitative Student Evaluation Scores** from the previous year
4. Appendix documenting achievements not listed on the CV. Five or fewer pages should be sufficient.

In the first year of an appointment, the submitted merit dossier must include the following materials. First-year faculty who submit the required documents will be assigned the average merit score for all faculty in the unit.

1. **Self-Filled Table of Meritorious Achievements** completed to the extent possible
2. Current CV in BGSU format
3. Syllabus for each course assigned for the fall semester

Calculation of Overall Merit Score

In determining the merit score for one year, the following applies:

1. The allocation of effort is determined with the director at the start of the academic year.
2. Two individuals from the Merit Committee will review each merit submission independently. At least one tenure-track member will review each TTF submission and at least one QRF member will review each QRF submission. A Merit Committee member will be absent when that individual's or a spouse/partner's merit is being reviewed.
3. Once the committee has reached consensus on the component merit scores in each performance category (Teaching, Scholarly/Creative Activity, Service), the overall merit score is calculated.

Exceeds Expectations for Merit	4.0 – 5.0
Meets Expectations for Merit	2.0 – 3.9
Fails to Meet Expectations	< 2.0
Unacceptable	0

- a) Each category (Teaching, Scholarly/Creative Activity, and Service) is calibrated on its own scale (0, 1, 2, 3, 4, 5). Tenure track/tenured faculty (TTF) are evaluated in Teaching, Scholarly/Creative Activity, and Service; QRF are evaluated in Teaching and Service.
- b) To achieve "Meets Expectations for Merit," the faculty member must have a minimum score of 2 (Meets Expectations for Merit) in **each** required category prior to weighting each category using the merit formula. A score of 1 (Fails to Meet Expectations) or 0 (Unacceptable) in any category makes the faculty member ineligible to receive merit during that year.
- c) TTF Calculation: [Teaching Merit Score * Allocation of Effort] + [Scholarly/Creative Activity Merit Score * Allocation of Effort] + [Service Merit Score * Allocation of Effort] = Overall TTF Merit Score
- d) QRF Calculation: [Teaching Merit Score * Allocation of Effort] + [Service Merit Score * Allocation of Effort] = Overall QRF Merit Score

Three-Year Rolling Merit Average:

Per the Collective Bargaining Agreement, a three-year arithmetic mean for awarding merit will be determined by calculating the arithmetic mean of the overall merit score for the current academic year and two previous years. The first-year merit score assigned to new faculty members will be excluded from the three-year rolling average. The three-year rolling average will begin with the merit score earned in the second merit evaluation.

Additional Academic Unit Merit Policy Information

1. Merit committee scores will be communicated to the faculty member and submitted to the director.

2. The appeal process is detailed in Section 3 of Merit Policy Part I: University-Wide Processes Required by the CBA.
3. Each piece of evidence may be used once in the merit document. A piece of evidence may NOT be counted within two categories (e.g., Teaching and Scholarly/Creative Activity); however, two or more pieces of evidence may be related to a large project or activity and counted in multiple categories.
4. See Merit Policy Part I: University-Wide Processes Required by the CBA for consideration of special circumstances (i.e., faculty exchange leave, leaves with extramural salary paid through the university payroll system, unpaid leave (100% time), sick leave, parental leave, partial unpaid leave (50% time), faculty improvement leave, other special circumstances not listed above). Faculty with these special circumstances shall provide a brief explanation with the affected dates and adjusted workload allocation (if applicable) on the merit submission form.
5. A QRF who has scholarly/creative work contributions (e.g., participation in grant; conference presentation) is permitted to utilize those as service evidence (e.g., service to the profession).
6. Faculty members must complete and submit the annual merit report by the publicized deadline using the forms (based on this policy) provided by the unit.

Approved by:

Patrick Pauken

 Director, School of Counseling, Higher Education, Leadership, and Foundations

12/12/2023

Date

Dawn Shinew

[Dawn Shinew \(Dec 18, 2023 09:12 EST\)](#)

 Dean, College of Education and Human Development

12/18/2023

Date

Joe Whitehead

[Joe Whitehead \(Dec 18, 2023 10:17 EST\)](#)

 Provost and Senior Vice President

12/18/2023

Date

School of Counseling, Higher Education, Leadership, and Foundations Merit Form

Faculty Member's Name: _____

Position: _____

Year Under Review: _____

Academic Unit: _____

Allocation of Effort: **Teaching:**_____ % **Scholarly/Creative Activity:**_____ % **Service:**_____ %

Table of Meritorious Achievements

TEACHING		
Teaching Performance Indicators		
Self-Report Merit Score for Teaching (Completed by Faculty Member)		
Reviewer 1:	Reviewer 2:	Final

SCHOLARLY/CREATIVE ACTIVITY		
Scholarly/Creative Activity Performance Indicators		
Self-Report Merit Score for Scholarly/Creative Activity (Completed by Faculty Member)		
Reviewer 1:	Reviewer 2:	Final

SERVICE		
Service Performance Indicators		
Self-Report Merit Score for Service (Completed by Faculty Member)		
Reviewer 1:	Reviewer 2:	Final

Faculty Member Comments (Explanation of changes in allocation of effort or other special considerations)
Review Committee Comments

To be completed by merit committee:

	Teaching	Research/Creative Activity	Service	Total Weighted Score
Committee Score				
Allocation of Effort				
Weighted Score				

Quantitative Student Evaluation Scores

Year/ Semester	Course	Number of Students	Number of Respondents	Course Mean	Course SD	Unit Mean	Unit SD	Comments to Personnel Committee
Student evaluations average of all courses for this year:								










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Final Audit Report

2023-12-18

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