

**School of Applied Human Development  
College of Education and Human Development  
Merit Policy  
Part II: Academic Unit Criteria, Standards, and Processes**

**Merit Criteria, Performance Indicators, and Expectations**

| <b>Evaluation Rating Category</b>     | <b>TEACHING</b><br><b>Expected levels of accomplishment on teaching indicators</b>   | <b>Merit Score for Teaching</b> |
|---------------------------------------|--|---------------------------------|
| <b>Exceeds Expectations for Merit</b> | <p><b><u>To achieve a score of 5:</u></b> High level of involvement in teaching activities, including five (5) or more performance indicators listed in Meets Expectations for Merit</p> <p><b><u>To achieve a score of 4:</u></b> High level of involvement in teaching activities, including four (4) performance indicators listed in Meets Expectations for Merit</p>  | 4-5                             |
| <b>Meets Expectations for Merit</b>   | <p><b><u>To achieve a score of 3:</u></b> High level of involvement in teaching activities, including three (3) performance indicators listed below</p> <p><b><u>To achieve a score of 2:</u></b> Evidence of two (2) performance indicators listed in below</p> <ul style="list-style-type: none"> <li>• Quantitative student evaluation scores at the appropriate level on a 5-point scale: <b>5</b> = <math>\geq 4.0</math>; <b>4</b> = <math>\geq 3.8</math>; <b>3</b> = <math>\geq 3.6</math>; <b>2</b> = <math>\geq 3.4</math>; <b>1</b> = <math>&lt; 3.4</math></li> <li>• Integration of innovative teaching practice with reflective analysis of implementation (e.g., clear use of culturally inclusive pedagogy and/or strategy to address equity, inclusion, and diversity in course content, high impact learning activities)</li> <li>• Professional development related to teaching effectiveness with reflective analysis of implementation</li> <li>• Teaching award and distinction</li> <li>• Development of a new course, minor, certificate, or program approved through curriculum approval process</li> <li>• Substantial curriculum modification of existing course, minor, certificate, or program approved through curriculum approval process</li> <li>• Academic advising (highlight quantity on CV)</li> <li>• Contributions to student professional development activity (e.g., student career day, extracurricular seminars, an exhibition)</li> <li>• Participation in a learning community to enhance teaching (list title, duration, and implementation of strategies learned)</li> <li>• Internal/external grants (submitted and/or funded) to support teaching activities (not travel grants)</li> <li>• Director or co-director of study abroad or extended off campus student trip</li> <li>• Thesis/project/dissertation chair or committee member</li> <li>• Comprehensive examination chair or committee member (list role)</li> <li>• Graduate faculty representative on preliminary exam, dissertation proposal, or dissertation defense</li> </ul> | 2-3                             |

|   |   |  |
|---|---|--|
|   | <ul style="list-style-type: none"> <li>Supervision of independent study (at least 3 student credit hours; provide list)</li> <li>Undergraduate honors project chair/advisor/member (provide list)</li> <li>Coordinator of multiple course sections or course field/clinical experience</li> <li>Evidence of teaching effectiveness that contributes to student success and/or institutional innovation (provide supporting evidence)</li> </ul>   |  |
| <b>Fails to Meet Expectations for Merit</b> | Evidence of one (1) performance indicators listed in Meets Expectations for Merit<br>Quantitative student evaluations average of all courses is below 3.4 on a 5-point scale.   | 1  |
| <b>Unacceptable</b>                         | No merit materials submitted and/or no evidence of teaching performance indicators listed in Meets Expectations for Merit   | 0  |
|   | <b>Merit Score for Teaching</b> (To be completed by Merit committee members)  |  |
| <b>Evaluation Rating Category</b>           | <b>SCHOLARLY/CREATIVE ACTIVITY</b><br><b>Expected levels of accomplishment on scholarly/creative activity indicators</b>  | <b>Merit Score for Scholarly/Creative Activity</b> |
| <b>Exceeds Expectations for Merit</b>       | <b>To achieve a score of 5:</b> Two (2) peer-reviewed publications OR one (1) authored or edited book OR any combination of five (5) scholarly/creative activity indicators listed in Meets Expectations for Merit, at least three of which are peer-reviewed<br><b>To achieve a score of 4:</b> One (1) peer-reviewed publication AND one (1) scholarly/creative activity indicator listed in Meets Expectations for Merit OR any combination of four (4) scholarly/creative activity indicators listed in Meets Expectations for Merit, at least two of which are peer-reviewed   | 4-5  |
| <b>Meets Expectations for Merit</b>         | <b>To achieve a score of 3:</b> A combination of two (2) scholarly/creative activity indicators listed below plus one peer-reviewed manuscript under review that was submitted during the merit review period<br><b>To achieve a score of 2:</b> A combination of three (3) scholarly/creative activity indicators listed below <ul style="list-style-type: none"> <li>Peer-reviewed publication</li> <li>Manuscript submitted during the merit review period and under peer review</li> <li>External grant funded or submitted (see scholarly/creative activity notes below)</li> <li>Internal research grant funded or submitted</li> <li>Book editor</li> <li>Book chapter</li> <li>Published symposia</li> <li>Book review in a peer-reviewed publication</li> <li>Invited presentations at international, national, regional/state, or local conference</li> </ul> | 2-3  |

|   |  |   |
|---|--|---|
|   | <ul style="list-style-type: none"> <li>• Peer-reviewed presentations at an international, national, or regional/state conference</li> <li>• Conference proceeding or abstract</li> <li>• Scholarly international, national, or regional workshops related to research, research tools, and/or grant development</li> <li>• Editor, associate editor, or guest editor of a peer-reviewed publication</li> <li>• Member of a journal editorial board (not an ad hoc reviewer)</li> <li>• Refereed creative work at an international, national, or regional juried exhibitions or competition</li> </ul>  |   |
| <b>Fails to Meet Expectations for Merit</b> | Minimal evidence of peer reviewed scholarly/creative activity or one (1) indicator listed in Meets Expectations for Merit.   | 1 |
| <b>Unacceptable</b>                         | No significant documented scholarly/creative activity or no materials submitted for review.  | 0 |
|   | <p>Scholarly/creative activity notes:</p> <ul style="list-style-type: none"> <li>• Each instance of an indicator counts as one indicator</li> <li>• If an in-press publication is counted for merit, then it cannot be counted when published in another merit year.</li> <li>• Service grants count towards service. If the service grant involves a scholarly/creative activity component, only that component counts toward scholarly/creative activity. In such cases, faculty need to provide documentation about distribution of effort.</li> <li>• Large individual grants (over \$25,000, for a two-year period) may be submitted for each merit year of the period of the grant. Grants with team members must be at least \$100,000 to be counted for each year of the duration of the grant.</li> <li>• Submitted grants are counted only in the year of submission, regardless of the size of the grant. If they are funded that same year, only the funded grant is counted, not the submission.</li> </ul> |   |
|   | <b>Merit Score for scholarly/creative activity.</b> (To be completed by Merit committee members.)  |   |

| Evaluation Rating Category            | SERVICE<br>Expected levels of accomplishment on service indicators  | Merit Score for Service |
|---------------------------------------|---|-------------------------|
| <b>Exceeds Expectations for Merit</b> | <p>Participation in the following: (a) two recruitment or retention-based initiatives (e.g., Get with the Program, meeting with a prospective student, Preview Days, President’s Day); (b) program, school, and college meetings; AND</p> <p><b>To achieve a score of 5:</b> Leadership (e.g., committee chair, project leader, active team facilitator) in one (1) service indicator at the program, school, college, university, profession, or community (related to the discipline) level AND four (4) service indicators listed in Meets Expectations for Merit or fulfillment of duties in a timely and thorough manner as clinical supervisor, program coordinator, or assistant director plus one additional service indicator listed in Meets Expectations for Merit</p> <p><b>To achieve a score of 4:</b> Leadership (e.g., committee chair, project leader, active team facilitator) in one (1) service indicator at the program, school, college, university, profession, or community (related to the discipline) level AND three (3) service indicators listed in Meets Expectations for Merit or fulfillment of duties in a timely and thorough manner as clinical supervisor, program coordinator, or assistant director</p>   | 4-5                     |
| <b>Meets Expectations for Merit</b>   | <p>Participation in the following: (a) two recruitment or retention-based initiative (e.g., Get with the Program; meet with a prospective student, Preview Days, President’s Day); (b) program, school, and college meetings; AND</p> <p><b>To achieve a score of 3:</b> Contributions as a member in one (1) service indicator at the program, school, college, university, profession, or community (related to the discipline) level AND two (2) of the service indicators below</p> <p><b>To achieve a score of 2:</b> Contributions as a member in two (2) service indicators listed below</p> <ul style="list-style-type: none"> <li>• Committee member with contributions at the program school, college, university, profession, community (related to the discipline) level</li> <li>• Ad hoc service at program, school, college, university, profession, and/or community level (e.g., judge, sponsor)</li> <li>• Involvement organizing sessions, symposia, or panels for a professional conference or meeting</li> <li>• Advisor to campus student organization</li> <li>• Provider of workshops or speaking engagements related to profession or university mission</li> <li>• Peer observer/evaluator for colleague’s teaching (includes syllabus review, meeting to review observation)</li> <li>• Author of accreditation or national program approval report</li> <li>• Reviewer of manuscripts for peer-reviewed publications</li> <li>• Recipient of service award or citation</li> <li>• Administrative responsibility such as lab directors or clinical/field experience coordinator</li> </ul> | 2-3                     |

|   |  |   |
|---|--|---|
| <b>Fails to Meet Expectations for Merit</b> | One (1) service indicator listed in Meets Expectations for Merit   | 1 |
| <b>Unacceptable</b>                         | No significant documented service or no materials submitted for review.  | 0 |
|   | Service note: Each instance of an indicator counts as one indicator (e.g., serving as peer evaluator of teaching for two different faculty members = 2 service indicators) |   |
|   | <b>Merit Score for Service.</b> (To be completed by Merit committee members.)  |   |

### Merit Policy: Academic Unit Criteria, Standards, and Processes

#### **Merit Committee Composition and the Election/Appointment Process**

Merit reviews are conducted by the merit committee that consists of five (5) faculty members with at least one QRF and one TTF faculty member. Committee members are elected by the faculty for staggered terms of three academic years with dates of service corresponding to 9-month contract dates. Elections will occur the spring semester prior to the end of the academic year. Whenever possible, representatives will be from different program committees, with no more than two representatives from any one program committee. In subsequent years, programs without a representative will have first right of refusal for inclusion on committee. Members may not serve on the merit and personnel committees at the same time. 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. The School of Applied Human Development Merit Submission Form (below) that includes the approved workload allocation, summary table of activities for teaching, scholarly/creative activity, and service for the year under review, and quantitative student evaluation scores (if applicable)
2. An abbreviated curriculum vitae (CV) in the required BGSU format containing only activities for merit year under review. *Peer-reviewed publications listed on CV must include month/year of acceptance and/or publication. Documentation of acceptance for in-press publication and submission of manuscripts under review should be attached.*
3. An optional no more than a one-page narrative may be attached clarifying activities that may not be apparent to the committee (e.g., abnormally low SEIs; committees requiring extraordinary effort; required documentation of or reflection on specific indicators).

These materials should be combined into a single PDF document and uploaded into the University sanctioned performance evaluation system by the publicized deadline.

In first year of an appointment, the following materials are required:

1. The School of Applied Human Development Merit Submission Form; other performance indicators may be listed but are not required in the first year
2. Current CV in required BGSU format
3. Syllabus for each fall semester course assigned

Upon submission of these materials, first-year faculty will be assigned the average merit score of all faculty in the school. This first-year score is excluded from the three-year rolling average. The rolling average will begin in the second year.

### Calculation of Overall Merit Score for One Year

1. Based on the materials submitted, each merit committee member individually evaluates appropriate merit components for each school faculty member and determines a score from 0 to 5. 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 rated in all three areas while QRF are rated in teaching and service only.
2. Committee members do not rate themselves or a spouse/partner and should be excused from the meeting during discussions related to their materials.
3. Merit committee members consider the documents from each faculty member using their allocation of effort to make a holistic judgment of whether the dossier fails to meet basic expectations for merit (not eligible for merit); meets expectations (eligible for merit); or exceeds expectations (eligible for merit).
4. The committee strives for consensus. If consensus cannot be reached, then the mode of the individual ratings shall be assigned for the category.

|   |                  |
|---|------------------|
| Exceeds Expectations for Merit <sup>a</sup> | <b>4.0 – 5.0</b> |
| Meets Expectations for Merit <sup>b</sup>   | <b>2.0 – 3.9</b> |
| Fails to Meet Expectations                  | <b>0.1 – 1.9</b> |
| Unacceptable                                | <b>0</b>         |

5. Once component scores are determined, the overall merit score is computed using a simple algorithm considering the weighted allocation of effort for each performance area.

The typical workload allocation is 50% teaching, 30% scholarly/creative activity, and 20% service for TTF and 80% teaching and 20% service for QRF. Multipliers for allocation of effort will be adjusted for approved alternative allocations.

The typical algorithms are

- [Teaching Merit Score \* Allocation of Effort] + [Scholarly/Creative Activity Merit Score \* Allocation of Effort] + [Service Merit Score \* Allocation of Effort] = Overall TTF Merit Score  
*OR*
- [Teaching Merit Score \* Allocation of Effort] + [Service Merit Score \* Allocation of Effort] = Overall QRF Merit Score

### Template for Determining Overall Merit Score Recommendations (Examples)

(To be completed with agreement reached by all members of the committee)

| Faculty Member               | Merit Score for Teaching<br>*.50 or .80 | Merit Score for Scholarly/<br>Creative Activity *.30 | Merit Score for Service<br>*.20 | Score | Merit Category                 |
|------------------------------|---|--|---------------------------------|-------|--------------------------------|
| <b>Tenure-Track Examples</b> |   |  |                                 |       |                                |
| TTF Person 1                 | 2*.50 = 1.0                             | 2*.30 = .6   | 2*.20 = .4                      | 2.0   | Meets expectations for merit   |
| TTF Person 2                 | 5*.50 = 2.5                             | 4*.30 = 1.2  | 2*.20 = .4                      | 4.1   | Exceeds expectations for merit |
| <b>ORF Examples</b>          |   |  |                                 |       |                                |
| QRF Person 1                 | 4*.80 = 3.2                             | NA   | 3*.20 = .6                      | 3.8   | Meets expectations for merit   |
| QRF Person 2                 | 5*.80 = 4.0                             | NA   | 3*.20 = .6                      | 4.6   | Exceeds expectations for merit |

- Three-Year Rolling Merit Average: Per the Collective Bargaining Agreement, the merit rating is averaged with the merit ratings from the previous two merit periods to calculate a three-year rolling average that will be used to recommend merit increases. 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**

- The School of Applied Human Development merit policy uses the university-wide processes required by the most recent CBA (Collective Bargaining Agreement). ***The CBA preempts and shall be incorporated into this merit policy whenever there is conflict, ambiguity, and/or need of gap filling.***
- 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.
- Each piece of evidence may only be counted in ONE category (e.g., Teaching or Service); however, two or more pieces of evidence may be related to a large project or activity and counted in multiple categories.
- 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).
- The appeal process is detailed in Section 3 of Merit Policy Part I: University-Wide Processes Required by the CBA.
- 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.

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Approved by:

*Deborah J. Wooldridge*

09/12/2024

Director, School of Applied Human Development

Date

*Dawn Shinew*

Dawn Shinew (Sep 12, 2024 14:08 EDT)

09/12/2024

Dean, College of Education and Human Development

Date

*Glenn M. Davis*

Glenn Davis (Sep 12, 2024 12:54 EDT)

09/12/2024

Provost

Date



### School of Applied Human Development (AHD) Merit Submission Form

**Faculty Member's Name:** \_\_\_\_\_

**Position:** \_\_\_\_\_

**Year Under Review:** \_\_\_\_\_

**Academic Program Unit:** \_\_\_\_\_

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

**Brief note on allocation of effort if applicable:**

|  |
|--|
|  |
|--|

#### Summary Table of Teaching, Scholarly/Creative Activity & Service Indicators

(See Attached example at end of document)

|  |                         |                             |
|--|-------------------------|-----------------------------|
| For each category, list all relevant performance indicators from the Merit Criteria, Performance Indicators, and Expectations Table                        |                         |                             |
| Teaching<br>Comments: (Add narrative to explain items if needed)   | Raw<br>score            | Raw Score X<br>Allocation % |
| Performance Indicators:  |                         |                             |
| Scholarly/Creative Activity<br>Comments: (Add narrative to explain items if needed)  | Raw<br>score            | Raw Score X<br>Allocation % |
| Performance Indicators:<br><br>PLEASE DO NOT LIST TITLES HERE. REPORT ONLY TYPES AND NUMBERS.<br>Committee and School Director will look for titles in CV. |                         |                             |
| Service<br>Comments: Add narrative to explain items if needed)   | Raw<br>score            | Raw Score X<br>Allocation % |
| Performance Indicators:<br><br>PLEASE REPORT ONLY NUMBER OF COMMITTEES HERE. Committee and<br>School Director will look for titles in CV.                  |                         |                             |
|  | Total<br>Merit<br>Score |                             |

If quantitative student evaluations are chosen as a teaching indicator, the follow table shall be completed and include student evaluations of instruction (SEIs) for all courses taught during the review period (Fall, Spring, Summer).

| Semester  | Course | Number of Students | Number of Respondent | Course Mean | Course SD | School Mean | School SD | Comments to the Committee |
|---|--------|--------------------|----------------------|-------------|-----------|-------------|-----------|---------------------------|
|   |        |                    |                      |             |           |             |           |                           |
|   |        |                    |                      |             |           |             |           |                           |
|   |        |                    |                      |             |           |             |           |                           |
| Student evaluations average of all courses for this year: |        |                    |                      |             |           |             |           |                           |

**To be completed by Merit committee:**

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

**Example for Filling out the Summary Table****Summary Table of Teaching, Scholarly/Creative Activity & Service Indicators**

| For each category, list all relevant performance indicators from the Merit Criteria, Performance Indicators, and Expectations Table  |                          |                                 |
|--|--------------------------|---------------------------------|
| <b>Teaching</b><br>Comments: (Add narrative to explain items if needed)  | <b>Raw score</b>         | <b>Raw Score X Allocation %</b> |
| Performance Indicators: <ul style="list-style-type: none"> <li>● 4.12 (<b>AVERAGE OF ALL COURSES</b> for AY)</li> <li>● Advised 30 students</li> <li>● 1 Diss. Chair indicator</li> <li>● 3 master thesis committee membership indicators</li> <li>● 5 teaching professional development indicators</li> </ul> Committee and School Director will look for titles in CV.                             |                          |                                 |
| <b>Scholarly/Creative Activity</b><br>Comments: (Add narrative to explain items if needed)   | <b>Raw score</b>         | <b>Raw Score X Allocation %</b> |
| Performance Indicators: <ul style="list-style-type: none"> <li>● 1 peer reviewed journal article.</li> <li>● 2 abstracts.</li> <li>● 3 peer reviewed conf. paper presentations</li> <li>● Any other items listed in the Research table of the Merit document.</li> </ul> PLEASE DO NOT LIST TITLES HERE. REPORT ONLY TYPES AND NUMBERS.<br>Committee and School Director will look for titles in CV. |                          |                                 |
| <b>Service</b><br>Comments: (Add narrative to explain items if needed)   | <b>Raw score</b>         | <b>Raw Score X Allocation %</b> |
| Performance Indicators: <ul style="list-style-type: none"> <li>● AHD: 2 comm.</li> <li>● EDHD: 2 comm.</li> <li>● UNIV: 1 comm.</li> <li>● Profession: 3 comm.</li> <li>● Any other items listed in the Service table of the AHD Merit document.</li> </ul> PLEASE REPORT ONLY NUMBER OF COMMITTEES HERE. Committee and School Director will look for titles in CV.                                  |                          |                                 |
|  | <b>Total Merit Score</b> |                                 |











# AHD Merit Document (Final 11-30-2023C)

Final Audit Report

2024-09-12

|                 |  |
|-----------------|--|
| Created:        | 2024-09-12                                   |
| By:             | Kimberly Caris (kcaris@bgsu.edu)             |
| Status:         | Signed                                       |
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