

Date: March 6, 2007


MEMORANDUM

TO: Elizabeth J. Stroble
Sr. Vice President, Provost and C.O.O.

FROM: James M. Lynn, Interim Dean
College of Fine and Applied Arts

RE: Merit Guidelines

The attached merit guidelines and criteria have been approved by the faculty of the School of Family and Consumer Sciences on March 6, 2007. I have approved all attached guidelines and criteria.




Department Chair or Faculty Representative
Pamela A. Schulte, Merit Committee Chair

3/6/07
Date



Dean

3-7-07
Date



Senior Vice President, Provost,
and Chief Operating Officer

3/13/07
Date

MEMORANDUM

DATE: February 22, 2007

RE: Merit Guidelines for Family and Consumer Sciences

The following changes were suggested by the Provost's office via Dean Lynn. We are addressing their concerns as follows (highlighted in yellow in the merit document).

COMMENT

- Table page 2: What is an "Uncontrolled Faculty Member"?
- "Other" categories need to be potentially worth more.
- Must a faculty member do all items listed under "satisfactory" in order to be considered "satisfactory?"
- There must be some language regarding Faculty Improvement Leave

CHANGE

- "Uncontrolled" has been changed to "Unsatisfactory"
- The points for "Other" have been changed from "1-2" to "1-4." Wording also added giving director discretion over points awarded
- No—the minimum number of satisfactory items accomplished is specified for each category. For each activity in the "satisfactory" column over and above the minimum required, merit could be claimed.
- Such language was already present and is now highlighted.

*Included in R that begins "Faculty
in the School of..."*



Merit Pay Distribution Procedure for the School of Family & Consumer Sciences

Preliminary notes: The first section of the merit discussion in the Compensation contract agreement (attached at the end of this document) states:

*Each department shall formulate and adopt by majority vote of its bargaining unit faculty criteria for merit evaluations with specified weighting for the **research, teaching, and service** components. These criteria may subsequently be modified only by a majority vote of the department faculty. The department chair, dean, and the Senior Vice President and Provost must also approve these criteria.*

In addition, according to the Compensation article:

*(1) In preparation for the Chair's evaluation, all Members of the Bargaining Unit will submit to the Chair a report of their teaching, scholarship, and service during the preceding year. **A three-year rolling average may be the basis for the evaluation, if appropriate.** In addition to any materials required by this Agreement, by Department merit criteria, or by the Department Chair, Bargaining Unit Faculty may include whatever material will provide evidence of successful teaching, scholarship or service.*

The School of Family and Consumer Sciences has elected representatives to a Merit Review Committee with members from each division of the school. This committee is responsible for drafting merit guidelines. These guidelines, after approval by the faculty, School Director, CFAA Dean and UA Provost's office, will serve as the template for individual merit point calculations. Through this mechanism, the Merit Review Committee is "recommending" the outcome of individual faculty merit calculations to the School Director (Item 4 – Provost's Merit Guidelines Review Sheet PMGRS). The School Director will discuss each case with the individual faculty member and has the discretion to make further refinements as necessary.

Faculty in the School of Family and Consumer Sciences will generally weight teaching **60%**, **research 20%**, and **service 20%**. Because of the possibility several variables in the professional activities of faculty, including faculty improvement leaves and other leaves, these weightings may vary (Item's 2, 3 and 7 – PMGRS). The School Director, through annual goals/objectives discussions with individual faculty members, will hear arguments for individual adjustment of weightings. The Director will advise the Merit Review Committee of any departures from the general 60% 20% 20% weighting.

Criteria for Merit and merit points claimed are itemized and listed (Item 6 – PMGRS) on the Merit Documentation Form (Attachment 1). Note that appropriate signature lines are in place as required (Item 10 – PMGRS). Each criteria for merit is quantifiable to the extent possible. However, the faculty and School Director realize that some meritorious activities are less quantifiable than others. For example, exemplary teaching is quantifiable through standardized teaching evaluations and peer reviews. Equally important are qualitative teaching evaluations, course materials, syllabi, and so on. Clear definitions satisfactory and meritorious are plainly listed on the Merit Documentation Form as well.

Further – no merit can be claimed in any category where satisfactory status was not achieved.

A Notation about limiting merit points. We limited the number of merit points for several reasons.

1. The most important reason to fix the number of merit points is that the dollars in the merit pool is also fixed. It only makes sense to leave merit open if the dollar amount in the pool is also flexible. As it

stands, unlimited merit points only devalues the worth of a single point, and thus devalues the work faculty do.

2. A second reason to limit merit points has to do with the demand that the academic unit be able to demonstrate quantifiable differences between the rankings 1=Unsatisfactory to 5=Extraordinary. If there were no limits on merit points earned, there would be no possible way to demonstrate the “distance” between a 1 and a 2, or a 3 and 5. These are relative differences, and can only become known in advance of actual calculation, if the number of points in the system is fixed (**see the chart below**).

3. Finally, we limited merit points in each category to enhance the quality of our professional lives. When we ask ourselves why we try to publish in professional journals, the answer is NEVER so that we can garner merit points or keep graduate faculty status. This is true of other aspects of our employment, that which is meritorious in points terms, or just plain good for the university and ourselves. We limited the number of points in our system, AND we limited the criteria for merit as well. We wanted to try to offer some quality to the definition of merit.

Simply put, someone determined to “earn” as much merit as possible could actually concentrate on those aspects of merit that are easily attained. By limiting merit in categories of teaching, research, and service, we have made it an important feature of our document that faculty need to be well-rounded and balanced in their approach to merit. Our document reflects that balance with fixed, categorical merit points.

A Chart Detailing the Relationship of Total Points Awarded to Merit Rankings (Item 7 –PMGRS).

| FCS Merit System Detailing the Relationship of Evaluation Category and Total Scores to Merit Score | | | | | | | |
|---|---------------------------|-------------|--------|-----------------------|---------|----------------------|--------------|
| Faculty must meet satisfactory criteria before claiming merit. | | | | | | | |
| Notes on Calculation The Raw Performance Score is the (Eval Category Total) ÷ 8 possible points in the category) * 5 Merit Categories Weights are 60% for teaching, 20% for research, 20% for service Weighted Performance is Raw Performance Score times Weight resulting in discreet scores for each Evaluation Category Red Total (bottom right) is the Merit Score | | | | | | | |
| Unsatisfactory Faculty Member | | | | | | | |
| Eval Category | Satisfactory (4 possible) | Meritorious | Totals | Raw Performance Score | weights | Weighted Perf. Score | |
| teaching | 1 | | 0 | 1 | 0.625 | 0.60 | 0.375 |
| research | 2 | | 0 | 2 | 1.667 | 0.20 | 0.333 |
| service | 2 | | 0 | 2 | 1.667 | 0.20 | 0.333 |
| Totals | 5 | | 0 | 5 | | 1.00 | 1.042 |
| Satisfactory Faculty Member | | | | | | | |
| Eval Category | Satisfactory (4 possible) | Meritorious | Totals | Raw Performance Score | weights | Weighted Perf. Score | |
| teaching | 4 | | 0 | 4 | 2.500 | 0.60 | 1.500 |
| research | 2 | | 0 | 2 | 1.667 | 0.20 | 0.333 |
| service | 2 | | 0 | 2 | 1.667 | 0.20 | 0.333 |
| Totals | 8 | | 0 | 8 | | 1.00 | 2.167 |
| Meritorious Faculty Member | | | | | | | |
| Eval Category | Satisfactory (4 possible) | Meritorious | Totals | Raw Performance Score | weights | Weighted Perf. Score | |
| teaching | 4 | | 1 | 5 | 3.125 | 0.60 | 1.875 |
| research | 2 | | 2 | 4 | 3.333 | 0.20 | 0.667 |
| service | 2 | 1 | 1 | 3 | 2.500 | 0.20 | 0.500 |
| Totals | 8 | | 4 | 12 | | 1.00 | 3.042 |
| Outstanding Faculty Member | | | | | | | |
| Eval Category | Satisfactory (4 possible) | Meritorious | Totals | Raw Performance Score | weights | Weighted Perf. Score | |
| teaching | 4 | | 3 | 7 | 4.375 | 0.60 | 2.625 |
| research | 2 | | 2 | 4 | 3.333 | 0.20 | 0.667 |
| service | 2 | 3 | 3 | 5 | 4.167 | 0.20 | 0.833 |
| Totals | 8 | | 8 | 16 | | 1.00 | 4.125 |
| Extraordinary Faculty Member | | | | | | | |
| Eval Category | Satisfactory (4 possible) | Meritorious | Totals | Raw Performance Score | weights | Weighted Perf. Score | |
| teaching | 4 | | 4 | 8 | 5.000 | 0.60 | 3.000 |
| research | 2 | | 4 | 6 | 5.000 | 0.20 | 1.000 |
| service | 2 | | 4 | 6 | 5.000 | 0.20 | 1.000 |
| Totals | 8 | | 12 | 20 | | 1.00 | 5.000 |

Thus, from the table you can see the difference between a merit score of 1 and 2 is 3 merit points, between a merit score of 3.042 and 5.00 is 6 merit points, and so on.

**SCHOOL OF FAMILY AND CONSUMER SCIENCES
MERIT CRITERIA DOCUMENT**

TEACHING EFFECTIVENESS 60%

| SATISFACTORY (Job Description) A faculty member must perform a minimum of <u>four (4)</u> activities from the “Satisfactory” category to be considered Satisfactory; after four (4), each additional item may be counted as meritorious activity. | MERITORIOUS (Performance Beyond Satisfactory) | POINTS CLAIMED | POINTS AWARDED |
|--|---|---|---|
| Satisfactory faculty load will be at least 18 out of 24 load hours per contract year. This includes teaching and administration, but is exclusive of assigned time for scholarly activity. | 1 point for each workload credit over satisfactory (See TAARS Reports for doc – includes I.I., Sp.Probs, UG Interns and other non-prep specific teaching). | Over a 3 year period most would get at least 1 point, if not 2. We expect no one to go over 24 credits per academic year. | We are NOT confusing overload with this criterion. We want to insure that admin. recognizes the value of non-prep. specific teaching. |
| 3 preparations per contract year | 1 merit points for each prep over minimum. | Over 3 yrs most would get 1-2 pts | |
| Preparation of updated course outlines, syllabi, bibs, lectures, exams. | 1 merit points for each innovation equal to a poster presentation in effort. Includes: Development and preparation of new classroom materials (i.e., design projects, CAD applications, instructional materials, web-enhancements etc.) | | |
| Service as reader on 1 graduate project per year | 1 merit point for service as reader for each over one. | | Theses are covered under the Thesis Bank – Master’s Projects are not – thus the opportunity for merit points |
| Service as Chair on 1 graduate project per year. | 2 merit points for service as chair for each over one | | Same argument here. |
| Conduct effective teaching strategies, instruction, and evaluations. Effective teaching strategies are defined as maintaining competencies in those classes for which the instructor is responsible. RTP guidelines cover this criterion for promotion. We are extending these | 1 merit point for development of a teaching strategy or mode of evaluation considered innovative or exceptional (equivalent to poster presentation). 1 merit point for each class with above average evaluations as defined by standardized evaluation scores above the minimum for tenure, exceptional peer evaluations, open-ended evaluations, or other | | |

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| definitions here. | evaluation tools/indicators of teaching excellence. | | |
| Keeps current in the field, having terminal degree, maintaining licensure where licensure is demanded as part of employment. Currently Dietetics faculty must maintain licensure as part of their specific area accreditation requirements. | 1 merit points for each licensure/certification; 1 point for each instance equivalent to a completed course: seminars, conferences, professional development that <u>exceeds</u> maintenance standards for the profession (for example, interior design faculty do maintain licensure, but are not required to do so) | | Note: Maintenance standards for the profession are those defined in our RTP guidelines by rank. Any activities beyond these standards apply here. |
| Teamwork on Accreditation Maintenance. | Writing accreditation documents beyond the team approach (1-3 points depending on role) | | We have recent memory of specific faculty writing entire accreditation documents single-handedly. |
| | Other (1-4 points) - Attach documentation as appropriate; Director will determine the number of points awarded. | | |
| | Teaching Effectiveness Totals - > Limit 4 points | | |

RESEARCH AND CREATIVE ACTIVITY 20%

| SATISFACTORY (Job Description) A faculty member must perform a minimum of <u>two (2)</u> activities from the "Satisfactory" category to be considered Satisfactory; after two (2), each additional item may be counted as meritorious activity. | MERITORIOUS (Performance Beyond Satisfactory) | POINTS CLAIMED | POINTS AWARDED |
|---|---|----------------|----------------|
| Publishing 1 refereed article within a 3 year period. | 1 merit point for each additional article published within a 3 yr. period. Thus 3 articles in 3 years would yield 2 merit points. | | |
| Satisfactory progress toward research, laying groundwork, preliminary methodological steps toward generating new research, presentations, or publications. | Grants – Applied or awarded – no distinction 2 merit points for each principal investigator 1 merit point for unpaid assist roles (e.g. data analysis). | | |
| Making a refereed presentation at a professional meeting. | Refereed presentations 1 merit point for each instance. Includes poster sessions where appropriate | | |

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| | Juried exhibitions, competitions of professional work. 1 merit point for each instance. | | |
| | Other: Books etc. 1-3 merit points as appropriate | | |
| | Other 1-4 points) - Attach documentation as appropriate; Director will determine the number of points awarded. | | |
| | Totals for Research and Creative Activity Limit 4 points | | |

SERVICE 20%

| SATISFACTORY (Job Description) A faculty member must perform a minimum of <u>2 (two)</u> activities from the "Satisfactory" category to be considered Satisfactory; each item above and beyond the four required may be counted as meritorious activity. | MERITORIOUS (Performance Beyond Satisfactory) | POINTS CLAIMED | POINTS AWARDED |
|--|--|----------------|----------------|
| Service on any combination of two university, college, or departmental committees excluding RTP, Graduate Faculty, Area or Division | 1 merit points for each instance above the satisfactory (above service on any combination of two university, college or departmental committees excluding RTP, Graduate Faculty, Area or Division). | | |
| Service on Committees does not require a Chairship for satisfactory rating. | 1 merit points for each Chairship of a university, college, or departmental committee (one point for chairing and one point for serving on a committee) | | |
| Participation in scheduled student activities. | 1 merit points for advising student organizations, activities, or clubs | | |
| Maintain usable technical expertise of standard equipment (e.g. desktop/laptop computer and common software). | 1 merit points for providing technical support (equivalent to the time spent teaching one class), maintenance of labs and equipment, studios, collections, computer equipment without release time | | |
| Maintain membership in appropriate | 1 merit points for providing | | |

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|--|---|--|--|
| professional organizations | leadership in professional organizations (e.g. holding office, serving on committees, providing ongoing expertise) for each office/role | | |
| | Serving as a reviewer (1 point for each article or book reviewed) or editor/associate editor (2 points) | | |
| 10 hours of community service or presenting twice at community organizations | 1 merit point for each additional 5 hours of community service or presentation, which may include guest lectures. | | |
| | Other 1-4 points) - Attach documentation as appropriate; Director will determine the number of points awarded. | | |
| | Totals for Service-> Limit 4 points | | |