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MEMORANDUM

March 13, 2013

TO: William M. Sherman
Senior Vice President, Provost and Chief Operating Officer

FROM: Susan J. Olson
Associate Dean, College of Education

RE: Merit Salary Guidelines and Criteria 2013 Revision

The attached merit salary guidelines and criteria have been approved by the Faculty of the Department of Educational Foundations and Leadership. I have approved all attached guidelines and criteria.

If you concur, we ask that you also approve the guidelines and criteria.

S. Kuse
Department Chair or Faculty Representative

3/13/13
Date

Aileen J. Olson
Associate Dean

3/13/13
Date

Mike Sherman
Senior Vice President, Provost and Chief
Operating Officer

3.13.13
Date

EF & L MERIT PAY PLAN PHILOSOPHY

The EF&L merit pay plan is guided by the department's RTP criteria. It provides a means for distributing a pool of money allocated for salary increases. It attempts to recognize the diverse roles and contributions of the department faculty members without privileging some disciplines and activities over others.

The Department of EF&L is unusually heterogeneous in comparison to many other UA departments, such as English, history, etc. The department is comprised of faculty whose specialties include K-12 educational administration, K-12 teacher preparation, higher educational administration, postsecondary technical education, research methodology, instructional technology education, economics education, and social foundations. Not only is the range of disciplines taught by the faculty quite diverse and the responsibilities of individual faculty members differ, but also there is diversity among faculty members within the same discipline.

The students we serve include undergraduate and graduate students, part-time, and full-time students, students employed in K -12 public and private educational organizations, students employed in higher ed. institutions, students employed by private and public non-education employers, students from urban, suburban, and rural areas, and students at different stages of adult development.

In order to further address individual differences in responsibilities and achievements, each tenured faculty member has some flexibility in choosing the distribution of values for each category: Teaching, Research, and Service. For Teaching the range is 40 - 60%, for Scholarship the range is 30 - 50 %, and for Service the range is 10 - 20 % for a total of 100%. Beginning in 2006-07 the faculty member will choose the specific value to use for each category by the second Friday of the fall semester of the academic year under consideration. If a tenured faculty member does *not* select a range of values, the following default values will be used: Teaching 60%, Scholarship 30%, and Service 10%.

Tenure-track faculty for this year only may select their distribution of values for each category (Teaching, Research, & Service) for past years. Beginning in 2006-07 all choices must be made prior to the 2nd Friday of the fall semester of the academic year under consideration, whichever is later. Tenure-track faculty must consult with the department chair in selecting the values for each category and the chair must approve the final selection. This variable distribution is in accordance with the contract's use of "weights" in its reference to percentages used to describe how much of the faculty member's effort is spent in each of the three categories: Teaching, Research, and Service.

The plan includes a scale for converting the accumulated points into a score to determine the faculty member's merit rating in each category. A simple formula is provided for then calculating the final score and assignment of merit pay. The EF&L merit pay plan seeks to be inclusive, to bring faculty members together, and to provide a means for honoring the contributions of everyone with equity and fairness.

EF & L FACULTY MERIT PAY PLAN FORM

This form is to be completed annually by each EF & L tenured/tenure-track professor. Brief documentation to support each item earning points needs to be attached.

Instructions:

Step 1. For each category (Teaching, Scholarship, and Service) give yourself 1 point for each activity/accomplishment (except for items requesting a variable number of points).

Step 2. For each category (Teaching, Scholarship, and Service) add the number of points accumulated and write that amount on the line for My Points for that category.

Step 3. Use the following scale to determine your merit score/rating for each category based on the points accumulated for each category. (This scale is also used to determine your final overall score/rating.) Write the score on the Score line for that category.

20 and above	=	5	(Extraordinary) *
15-19 pts.	=	4	(Outstanding) *
10-14 pts.	=	3	(Meritorious) *
5-9 pts.	=	2	(Satisfactory) *
0-4 pts.	=	1	(Unsatisfactory)

* = Final overall rating eligible for merit pay

Satisfactory performance in each area shall be defined as the following:

Teaching: A faculty member dependably discharges teaching duties, such as prepares class materials, meets classes, grades papers promptly, responds to students in a timely manner, maintains approved office hours, submits course syllabi to department chair, attends to assigned advisees and completes and submits course evaluation(s).

Scholarship: A faculty member has evidence of ongoing research through such items as a conference paper, conference attendance, book reviews, publication or grant application and/or funding.

Service: A faculty member attends and participates in assigned committees or departmental, college and/or university activities.

Step 4. Determine your final merit score/rating by using the following formula:

Score A x (.40 - .60) + Score B x (.30 - .50) + Score C x (.10 - .20) = Merit Score/Rating

Score A x (your chosen weight) + Score B x (your chosen weight) + Score C x (your chosen weight) = Merit Score/Rating

As requested, faculty will provide sufficient evidence to support activity in each evaluative category. Additional evidence may be requested by the chair.

Step 5. To be completed by dept. chair. The Merit Score for each dept. faculty member will then be used to determine actual merit pay raise dollars. The dept. chair will complete the required grid (as shown in the Contract) to determine actual dollars.

Merit Criteria – Revised 4/3/2012

Teaching Criteria	Possible Points	My Points
Number of new (or not taught in previous 2 years) courses or workshops taught during calendar year	1 pt./course	
Student advising (quantity)	0-3 pts. (See rubric C below)	
Student advising (quality)	0-3 pts. (See rubric C below)	
Chaired doctoral committee(s)	2 pts./student	
Service on doctoral committee(s)	1 pt./student	
Service on doctoral internship committee(s)	1 pt./student	
Wrote/read Master's comp. exam questions	.5pt./student	
Wrote/read Doctoral comp. exam questions	1 pt./student	
Created a web-enhanced, web-based or online course for the first time	0-3 pts. per course (See rubric A below)	
Student evaluation scores and comments	0-3 pts. (See rubric B below)	
Participated in curriculum development activity	0-3 pts. (See rubric C below)	
Participated in professional development activity related to teaching	0-3 pts. (See rubric C below)	
Served as a student portfolio reviewer	.5pt./student	
Served as a student portfolio advisor	.5pt./student	
Participated in accreditation activities	0-3 (See rubric C below)	
1 st year tenure-track faculty	5 pts.	
Teach more than 4 preps. in one acad. year	1 pt./each prep. greater than 4	
Completed TK20 records each semester	0-3 pts. (See rubric C below)	
Supervise/coordinate/mentor adjunct faculty	0-3 pts. (See rubric C below)	
Create new course	3 pts.	
Extensive revision of a course	0-3 pts./ per course (See rubric C below)	
Received a teaching award (from COE or other organizations)	3 pts. per award	

Nominated and submitted application for COE and/or external teaching award	1 pt. per award	
Contributed to program growth & development (includes working with Outreach courses)	0-3 pts. (See rubric C below)	
Other (e.g., supervised student teachers, awarded a FPIL, innovative pedagogical formats, evaluation of student projects, honors college advising, honors college project reader)	0-5 points	
MY TOTAL		

Total TEACHING Points = _____ (0 – 20+ points)

SCORE A = _____ (Use 1 - 5 according to Scale on p. 2)

Final distribution of points is awarded at the discretion of the chair.

RUBRICS

Rubric A

Web-enhanced, web-based or fully on-line point distribution:

0 = No on-line presence; 1 = Web-enhanced; 2 = Web-based; 3 = Fully On-line

Rubric B

Course Evaluation point distribution:

0 = Below satisfactory; 1 = Inconsistent course evaluations; 2 = Consistent positive course evaluations; 3 = Pattern of excellence across all courses

Rubric C

All other scaled point distribution areas with the teaching criteria section:

0 = No evidence presented; 1 = Minimal evidence of activity; 2 = Some evidence of activity; 3 = Considerable evidence of activity

Scholarship Criteria	Possible Points	My Points
Refereed journal articles published	3 pts./article	
Refereed book published	6 pts./book	
Refereed book chapters published	3 pts./chapter	
International and national conference presentations	3 pts./presentation	
State/regional presentations	3 pts./presentation	
Local presentations	1 pt./presentation	
Initial manuscript submission	1 pt./submission	
Articles published in non-refereed journals and/or publications in discipline (e.g. Education Week, Chronicle of Higher Ed., Kappan, etc.)	1-3 pts./article (See rubric)	
Manuscript resubmitted with same reviewers	.5 pts./resubmission	
External grant/fellowship proposal(s) submitted	2 pts./submission	
External grant/fellowship received	1-3 pts./grant/fellowship received (See rubric)	
Internal grant proposal(s) submitted	1 pt./submission	
Internal grant received	2 pts./grant	
1st yr. tenure-track faculty	5 points	
Manuscript reviewer for journal	1 pt./review	
Book proposal reviewer for publisher	1 pt./review	
Book manuscript reviewer for publisher	1-3 pts./review (See rubric)	
Textbook reviewer	1 pt./review	
National/state conference presentation proposal submitted regardless of whether accepted or presentation occurred	1 pt. per proposal submitted	
Research mentor	0 – 3 pts. (See rubric)	
Editorial Board member	1-3 pts./board (See rubric)	
Editorial Board chair	1-3 pts./board (See rubric)	
Grant/ fellowship reviewer	1-3 pts./activity	
Research Award (from COE or other org.)	3 pts./award	
Nominated and submitted application for COE and/or external Research Award	1 pt./award	
Other	0-5 points	
TOTAL		

Total SCHOLARSHIP points = _____ (0– 20+ points)

SCORE B = _____ (Use 1 - 5 according to Scale on p. 2)

Final distribution of points is awarded at the discretion of the chair.

Rubric

All other scaled point distribution areas within the Scholarship section:

0 = No evidence presented; 1 = Minimal evidence of activity; 2 = Some evidence of activity; 3 = Considerable evidence of activity

Service Criteria	Possible Points	My Points
Department standing and/or ad hoc committee Membership	*0-3 points per committee	
College standing and/or ad hoc committee Membership	*0-3 points per committee	
University committee membership (Including Faculty Senate)	*0-3 points per committee	
Professional organization leadership/service (e.g., conference organizer, reviewer, session chair, and/or discussant, membership and/or committee chair)	*0-3 points per activity	
External community service/engagement	*0-3 points per activity	
Program evaluation (For other institutions or govt. entities)	*0-3 points per activity	
Student organization advisor	*0-3 points per organization	
1st year tenure-track faculty	5 points	
Completed professional development needed to perform service activity	*0-3 points	
Professional org. membership/participation	*0-3 pts.	
Program marketing/recruiting	*0-3 pts.	
Developing/maintaining/evaluating website for program, org., etc.	*0- 3 pts.	
Nominated and submitted application for COE and/or external service award	1 pt./award	
Service award (from COE or other org.)	3 pts./award	
Other (e.g., develop department website, organize conference, AAUP liaison, scholarship interviews, recommendation letters, Honors College interviews, etc.)	0-5 points	
MY TOTAL		

Total SERVICE points = _____ (1- 20+ points)

SCORE C = _____ (Use 1 - 5 according to Scale on p. 2)

Final distribution of points is awarded at the discretion of the chair.

***Service Rubric:**

Based on the evidence submitted:

0 = No participation/committee did not meet/no evidence submitted

1 = Spotty attendance/committee charge not completed/minimal evidence submitted

2 = Full participation/committee charge addressed/some evidence submitted

3 = Full participation / leadership role / committee charge addressed / considerable evidence of activity