COLLEGE OF BUSINESS AND ECONOMICS  
Merit Evaluation Document  
Summary Sheet  
Revised October, 1995

(See pages 30-43 of the Revised Organization Manual, October, 1995)

NAME_________________________________________  ACADEMIC/FISCAL YEARS_________________

MERIT MATRIX  
FOR USE BY DEPARTMENTAL EVALUATOR(S) ONLY

<table>
<thead>
<tr>
<th>TEACHING</th>
<th>RESEARCH AND SERVICE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outstanding</td>
<td>Excellent</td>
</tr>
<tr>
<td>Outstanding</td>
<td>Outstanding</td>
</tr>
<tr>
<td>Excellent</td>
<td>Outstanding</td>
</tr>
<tr>
<td>Good</td>
<td>Excellent</td>
</tr>
<tr>
<td>Acceptable</td>
<td>Good</td>
</tr>
<tr>
<td>No Merit</td>
<td>No Merit</td>
</tr>
</tbody>
</table>

I. Teaching Evaluation

A. For courses submitted for teacher evaluation include the following:

<table>
<thead>
<tr>
<th>SEMESTER 1:</th>
<th>SEMESTER 2:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Name</td>
<td>Course No.</td>
</tr>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SEMESTER 3:</th>
<th>SEMESTER 4:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Name</td>
<td>Course No.</td>
</tr>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
</tbody>
</table>

B. Attach supporting documentation for teaching evaluation along with Purdue Evaluation printout.
II. Research and Service:

In accordance with the items listed on page 30-43 of the Organization and Policy Manual of the College of Business and Economics, indicate the number of items of each of the following activities you have completed during the indicated academic/fiscal years. Required documentation for each item must be attached. Necessary documentation items for each category are listed on page 4:

1. Publication of a book (6 points). This is contingent upon the following documentation:
   a. Signed contract with publisher
   b. Commitment of publisher to publish

2. Refereed journal article (4 points each)

3. Professional journal article (2 points each)

4. Chapter in a book (1 point each)

5. Study guide or instructor’s manual (1 point each)

6. Presentation of a paper of significant research and/or member of discussant panel in a faculty member’s discipline to a professional society. Simple chairing of a session does not count unless evidence of a significant contribution is presented. (1 point each)

7. Editor of a professional publication. There must be at least one issue published during the year. (1 point for each editorship per academic/fiscal year)

8. Editorial board member of a refereed or professional publication. (only 1 point will be given for each editorship per academic/fiscal year)

9. Successful submission and receipt of a grant of $1000 or more. Sabbaticals, college release time or college seed money do not count:

<table>
<thead>
<tr>
<th>Grants</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>$1,000 to &lt; $10,000</td>
<td>1 pt.</td>
</tr>
<tr>
<td>$10,000 to &lt; $25,000</td>
<td>2 pts.</td>
</tr>
<tr>
<td>$25,000 to &lt; $50,000</td>
<td>3 pts.</td>
</tr>
<tr>
<td>Over $50,000</td>
<td>4 pts.</td>
</tr>
</tbody>
</table>

10. Presentation of a program in Continuing Education, Executive Development, or Certification. Effectiveness should be demonstrated by ratings or other means. (Only one point will be given for each unique program in any academic/fiscal year, regardless of the number of times that
program is offered). Maximum points for the two academic/fiscal years are 6.

11. Major faculty advisor to a student organization in the College of Business and Economics in which significant meetings have taken place and in which the organization in not only progressing, but also making significant contributions to the background of the students and the College. (1 point for each advisorship per academic/fiscal year).

12. Officer, leader, or active committee member in a professional organization in the faculty member's discipline. The maximum number of points for the category is 8. (1 point per organization per academic/fiscal year).

13. Holding office or making a significant contribution to an active University or College Committee where a high level of responsibility is required. Documentation must include a minimum of 10 hours and/or 3 meetings per committee per academic/fiscal year. The maximum number of points for this category is 8.

14. Officer of a community organization or an active member of a public advisory committee (e.g., advisory committees of the Department of Public Instruction or other public agencies or commissions, state wide programs committee, etc.). These are normally appointments based on expertise and are unpaid positions. Holding public office and posts in religious/charitable organizations will not be counted. (1 point for each post per academic/fiscal year)

15. Professional consulting considered significant by the faculty member's department. Documentation of a minimum of 15 hours time per project must be submitted to qualify for 1 point per project. (SBDC and SBI consulting are limited to 1 activity point per academic/fiscal year regardless of the number of cases handled). Maximum points for this category are 6.

16. Attendance at professional meetings. Maximum points for this category are 2.

17. Each department merit committee (or chair if no merit committee exists) may select up to 2 faculty members per academic/fiscal year for significant departmental committee contribution or service for a maximum of 1 point per individual in any academic/fiscal year with a maximum of 2 points per individual per merit period.

18. Other research, publication, or service activity considered significant by the faculty member's department. Maximum points in this category are 6.
Required documentation for each numbered item must be submitted on separate sheets and attached to this summary sheet. Item Number:

1. **Publication of a Book**
   Title, signed contract with publisher, commitment of publisher to publish.

2. **Refereed Journal Article**
   Title of article, name of journal, publication date.

3. **Professional Journal Article**
   Title of article, name of journal, publication date.

4. **Chapter in a Book**
   Title of book, publisher, date of publication, name of chapter.

5. **Study Guide or Instructor's Manual**
   Title and/or title of the book to which publication is related, publisher, date of publication.

6. **Presentation of a Paper to a Professional Society in the Faculty Member's Discipline**
   Organization to whom presented, title of session, date of presentation, city in which presented; if appears in proceedings, so state.

   **Member of Discussant Panel at Society Meeting**
   Organization, title of session, date of presentation, city in which presented.

7. **Editor of a Professional Publication**
   Title of publication, dates of publication, publisher.

8. **Editorial Board Member of a Refereed or Professional Publication**
   Title of publication, date of publisher, publisher.

9. **Successful Submission and Receipt of a Grant of $1000 or More**
   Title of proposed study, dollar amount, beginning of grant date, (credit given
in academic/fiscal year in which grant was awarded only.)

10. **Presentation of a Program in Continuing Education, Executive Development, or Certification**
Organization to whom presented, title of session, total hours of presentation, sponsor of program, program evaluation or summary must be submitted to receive credit.

11. **Faculty Advisor to a student Organization in the College of Business & Economics**
Name of student organization, dates of service as advisor, significant activities and/or accomplishments of organization during the year. Total hours devoted to this organization per academic/fiscal year.

12. **Officer, Leader, or Active Committee Member in a Professional Organization in the Faculty Member's Discipline**
Office held or name of committee, dates of service, total hours devoted to this activity per academic/fiscal year. Name of organization, whether regional or national.

13. **Holding Office or Making a Significant Contribution to an Active University or College Committee**
Name of committee, date of membership, accomplishments of committee, hours devoted to this committee per year or number of meetings per academic/fiscal years.

14. **Officer of a Community Organization or Active Member of a Public Advisory Committee**
Name of state or local advisory committee, dates of service, accomplishments of committee total hours devoted to the activity per academic/fiscal year.

15. **Professional Consulting considered Significant of the Faculty Member's Department**
Name of firm or organization for whom consulting was done, subject of consulting assignment, total hours devoted to this assignment. (No firm name should be given in SBDC case.)

16. **Attendance at Professional Meetings**
Name of professional meeting, sponsoring organization, location, dates of
attendance.

17. Department Merit Committee Selection

Memo from merit committee indicating yourself as the recipient. (Memo can be from department chair if no merit committee exists.)

18. Other Research, Publication or Service Activity Considered Significant by Faculty Member's Department

Nature of activity, location, date, total hours devoted to each activity. Memo from department merit committee that activity was considered significant and will count toward your merit. (Memo can be from department chair if no merit committee exists.)
I. INTRODUCTION

The Board of Regents has traditionally maintained that educational quality should be sustained and strengthened through selective salary adjustments for meritorious faculty performance as judged by peer reviews. State compensation policies also have emphasized merit as the primary criterion for “discretionary” (not across the board) adjustments for unclassified employees. Continuing the Board’s policy and in anticipation of a State appropriation of funds for discretionary merit adjustments, the institutions should initiate unclassified personnel performance reviews within the following framework:

A. Merit recommendations for faculty shall be based on positive contributions by the faculty member to the teaching, research, public service and/or supportive functions inherent in the institution’s mission. Assessing of teaching faculty shall include consideration of student evaluations. (Regent Policy Document 74-13, October 4, 1974)

B. Merit recommendations for academic, unlimited and other unclassified staff shall be based on supervisory assessment of meritorious performance in their areas of assigned responsibility.

C. Race, religion, sex, national origin, age, handicap, political views or source of salary support shall not be factors in merit determination.

II. FRAMEWORK

A. This college-wide system was designed to promote an equitable division of merit funds among faculty members with similar levels of achievement within the areas of teaching, research, public service, and/or supporting activities. The plan was developed using the following principles as guidelines:

1. Annual merit increments are equitably allocated to faculty with a similar level of identifiable and documented accomplishments, regardless of departmental membership. The criteria used to judge performances would accommodate departmental differences with respect to activities and departmental missions.

2. Teaching excellence is a primary eligibility requirement for merit salary increments.
3. Participation in department, college, and/or university operations through advising and committee membership is considered to be part of every faculty member’s responsibility for all merit ratings above no merit.

B. Specific Aspects:

1. Five categories of merit ratings with specific minimum criteria requirements for each level except “no merit.”
   a. Outstanding
   b. Excellent
   c. Good
   d. Acceptable
   e. No Merit

2. Two consecutive academic/fiscal years are the period for review. The use of these academic/fiscal years is set aside to insure that all contributions are recognized.

3. Merit funds will be distributed by a salary-based allocation.

4. The evaluation of each individual will be based on both teaching and research and service such that:
   a. All faculty members are subject to the same criteria for research, publication, and service.
   b. Teaching effectiveness criteria is determined at the departmental level.
   c. Overall merit ratings will be determined at the departmental level and subject to review by the Dean.

III. PROCEDURE

A. The faculty member shall provide typewritten documentation for each area of faculty activity under review for merit purposes, i.e., effective teaching, research, publication, and service.

B. Merit evaluation shall be made at the departmental level. Departments shall establish an evaluation procedure to review the documentation of each faculty member and assign the appropriate rating on the cover sheet of the documentation.

C. The merit evaluation shall be shared with the faculty member involved prior to the time the recommendations are forwarded to the Dean.

   1. If a faculty member strongly disagrees with the departmental findings and a resolution is not obtained at the departmental level, a memo to this effect shall accompany the departmental recommendation forwarded to the Dean.

   2. The faculty member shall have the right to a meeting with department chair and/or chair of the departmental merit committee prior to the time the recommendation is forwarded to the Dean.

D. The merit evaluation shall be forwarded to the Dean of the College of Business and Economics for review.
1. If the Dean changes the departmental recommendation of a faculty member, the Dean shall report such change to the department and/or chair of the departmental merit committee, who, in turn, shall notify the faculty member.

2. The faculty member shall have the right to a meeting with the department chair and/or chair of the departmental merit committee and the Dean, prior to the time the Dean forwards the recommendation to Campus Administration.

3. If a disagreement persists, the aggrieved faculty member may forward said grievance to the College Faculty Grievance Committee for review, prior to the time the Dean forwards the recommendation to Campus Administration.

E. If any faculty member, department, or Dean has a problem or question regarding Merit Policy, such matters shall be referred to the College Salary Committee for clarification and review.

F. The Dean shall issue to the faculty a report on the distribution of monies by merit, COLA, and other - department, rank and college.

G. Merit funds shall be distributed on the basis of the following weights:

   1. Outstanding Merit Rating 2.0
   2. Excellent Merit Rating 1.5
   3. Good Merit Rating  1.0
   4. Acceptable Merit Rating   .5
   5. No Merit Rating    .0

H. The Faculty Salary Committee will review the system, the procedures, and the results on a periodic basis and make appropriate recommendations to the College Faculty.

I. This plan addresses the rating of merit only for purposes of salary.

J. This revised plan is to become effective for the July 1, 1993, to June 30, 1995, review period and subsequent merit cycles.

K. Copies of criteria that each department uses for evaluating teaching effectiveness shall be made available to the Salary Committee after the evaluations are completed. Copies will then be sent by the Salary Committee to each of the departments.

IV. CRITERIA

A. Teaching Effectiveness

Teaching Effectiveness shall be determined at the department level. Each department must develop standards for the various ratings regarding teaching effectiveness. Teaching effectiveness shall be based upon the college’s teaching effectiveness committee report adopted by the college faculty on October 20, 1993.

1. Student evaluations (mandatory) and chair/committee evaluations (optional). The computerized “Purdue System Instructor – Course Appraisal” instrument shall be administered by a third party during the last three weeks of the semester for all courses taught during both of the academic year semesters. Under no circumstances shall these evaluations be handled by the instructor or made available to the instructor until after grades for the semester have been turned in.

2. The questions included in the student evaluation document shall include the following five as the college wide core, plus 10 more questions to be chosen at the department level.
• 002 - My instructor displays a clear understanding of course topics.
• 007 - My instructor seems well prepared for class.
• 017 - My instructor displays enthusiasm when teaching.
• 041 - My instructor makes good use of examples and illustrations.
• 077 - My instructor deals fairly and impartially with me.

3. The student evaluation results shall be evaluated by calculating the mean of the median scores listed on each faculty member's evaluation sheet for each course. The mean of individual course results for each faculty member will then be classified/rated using the following college wide scale:

<table>
<thead>
<tr>
<th>Rating</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outstanding</td>
<td>4.0</td>
</tr>
<tr>
<td>Excellent</td>
<td>3.75</td>
</tr>
<tr>
<td>Good</td>
<td>3.5</td>
</tr>
<tr>
<td>Acceptable</td>
<td>3.0</td>
</tr>
<tr>
<td>No merit below</td>
<td>3.0</td>
</tr>
</tbody>
</table>

4. A full teaching portfolio will be required for merit purposes only: a. in those cases where student evaluation ratings are less than outstanding, or b. from probationary tenure track faculty.

5. In those cases where it is required, the teaching portfolio should document: a. extraordinary circumstances, b. exceptional contributions, or c. specific individual efforts made to enhance teaching skills.

6. The extent to which the above conditions are achieved will be determined at the department level, in light of the recommendations of the TEC.

7. Based on that departmental evaluation, the portfolio shall increment the student evaluation score by no more than .25, having an impact that shall not increase the merit category by more than one level (e.g. from Excellent to Outstanding).

8. In those cases where a teaching portfolio is not required, other information relevant to assessment beyond student evaluations, the nature of which is to be determined by the departments, shall be evaluated.

B. Research and Service

Participation in department, college, and/or university operations through advising and committee membership is considered to be a part of every faculty member’s responsibility for all merit ratings. Such activity alone would constitute the minimum requirements for an acceptable rating in this category. Other activities which would count toward higher ratings are listed in the section entitled, “Meritorious Research and Service Activities.” Minimum requirements for all ratings are explained below: (revised 10/95)

1. Outstanding (24 points, 4 points from items 1-6)

   Outstanding merit could be obtained by earning 24 points from the activities listed in “Meritorious Research and Service Activities”, including a minimum of 4 points from items 1-6.

2. Excellent (18 points, 2 points from items 1-6)

   Excellent merit could be earned by earning 18 points from the activities listed in “Meritorious Research and Service Activities”, including a minimum of 2 points from items 1-6.

3. Good (12 points)
Good merit could be earned by earning 12 points from the activities listed in “Meritorious Research and Service Activities.”

4. Acceptable (6 points)

Acceptable merit could be earned by earning 6 points from the activities listed in “Meritorious Research and Service Activities.”

5. No Merit

A faculty member with less than an acceptable rating will not be eligible for a merit increment. This policy likewise applies to those whose appointment is being terminated at the end of the current period.

C. Meritorious Research and Service Activities

1. Publication of a book (6 points). This is contingent upon the following documentation:
   a. Signed contract with publisher
   b. commitment of publisher to publish

2. Refereed Journal Article (4 points each)

3. Professional Journal Article (2 points each)

4. Chapter in a book (1 point each)

5. Study guide or instructor’s manual (1 point each)

6. Presentation of a paper of significant research and/or member of a discussant panel in a faculty member’s discipline to a professional society. Simply chairing a session does not count unless evidence of significant contribution is presented. (1 point each)

7. Editor of a professional publication. There must be at least one issue published during the year. (1 point for each editorship per academic/fiscal year)

8. Editorial board member of a refereed or professional publication. (Only 1 point will be given for each editorship per academic/fiscal year.)

9. Successful submission and receipt of a grant of $1,000 or more. Sabbaticals, college release time or college seed money grants do not count:
   
   Grants $ 1,000 to < $10,000 1 pt.
   $10,000 to < $25,000 2 pts.
   $25,000 to < $50,000 3 pts.
   Over $50,000 4 pts.

10. Presentation of a program in Continuing Education, Executive Development, or Certification. Effectiveness should be demonstrated by ratings or other means. (Only 1 point will be given for each unique program in any academic/fiscal year, regardless of the number of times that program is offered.) Maximum points for the two academic/fiscal years are 6.

11. Major faculty advisor to a student organization in the College of Business and Economics in which significant meetings have taken place and in which the organization is not only progressing, but also making significant contributions to the background of the students and the College. (1 point for each advisorship per academic/fiscal year.)
12. Officer, leader, or active committee member in a professional organization in the faculty member’s discipline. (One point per organization per academic/fiscal year.) The maximum number of points for the category is 8.

13. Holding office or making a significant contribution to an active University or College Committee where a high level of responsibility is required. Documentation must include a minimum of 10 hours and/or 3 meetings per committee per academic/fiscal year. The total maximum number of points for this category is 8.

14. Officer of a community organization or an active member of a public advisory committee (e.g., advisory committees of the Department of Public Instruction or other public agencies or commissions, statewide program committee, etc.). These are normally appointments based on expertise and are unpaid positions. Holding public office and posts in religious/charitable organizations will not be counted. (1 point for each post per academic/fiscal year)

15. Professional consulting considered significant by the faculty member’s department. Documentation of a minimum of 15 hours time per project must be submitted to qualify for 1 point per project. (SBDC and SBI consulting are limited to 1 activity point regardless of the number of cases handled.) Maximum points for this category is 6.

16. Attendance at professional meeting. Maximum points for this category is 2.

17. Each department merit committee (or chair if no merit committee exists) may select up to 2 faculty members per academic/fiscal year for significant departmental committee contribution or service for a maximum of 1 point per individual in any academic/fiscal year with a maximum of 2 points per individual per merit period.

18. Other research, publication, or service activity considered significant by the faculty member’s department. Maximum points in this category are 6.

D. Overall Criteria

Overall merit ratings are based on the ratings in the two major categories: teaching and research and service. The following table shows the maximum overall rating for all possible combinations of ratings in those two categories:

<table>
<thead>
<tr>
<th><strong>TEACHING</strong></th>
<th>Outstanding</th>
<th>Excellent</th>
<th>Good</th>
<th>Acceptable</th>
<th>No Merit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outstanding</td>
<td>Outstanding</td>
<td>Outstanding</td>
<td>Excellent</td>
<td>Good</td>
<td>No Merit</td>
</tr>
<tr>
<td>Excellent</td>
<td>Outstanding</td>
<td>Excellent</td>
<td>Excellent</td>
<td>Good</td>
<td>No Merit</td>
</tr>
<tr>
<td>Good</td>
<td>Excellent</td>
<td>Good</td>
<td>Good</td>
<td>Good</td>
<td>No Merit</td>
</tr>
<tr>
<td>Acceptable</td>
<td>Good</td>
<td>Acceptable</td>
<td>Acceptable</td>
<td>Acceptable</td>
<td>No Merit</td>
</tr>
<tr>
<td>No Merit</td>
<td>No Merit</td>
<td>No Merit</td>
<td>No Merit</td>
<td>No Merit</td>
<td>No Merit</td>
</tr>
</tbody>
</table>