

DEPARTMENT OF ACCOUNTING & MIS
Merit Allocation Metric

BACKGROUND

The portion of the merit pool allocated to each faculty member will be based upon the evaluation of the faculty member by the Department Chair in each of the applicable evaluation categories. It also will be based on the proportion of the faculty member's overall effort (workload) that she or he was assigned to devote to each category. Workload proportions are set by the Chair, in consultation with the faculty member, taking into consideration the teaching/research/service needs of the department.

MERIT PAY CALCULATION

Merit pay is determined as a weighted composite of the performance appraisals in the applicable categories of research, teaching and service. The individual's composite rating is calculated by weighting the rating for each evaluation category by the respective workload proportion from the individual's Appraisal Period Workload Worksheet. The workload is determined in advance and may include an optional summer research term (see attached worksheet) to the extent permitted by the Collective Bargaining Agreement. To participate in the merit pool the individual's composite rating must be at or above 3.0 on a 9 point scale.

The composite rating is computed as follows: for each evaluation category c (teaching, research, service) for which a faculty member i has a workload assignment, the faculty member receives a performance score (R_i^c) from the Chair, which is a number ranging from one (poor performance) to nine (excellent performance) in each area. The performance scores and corresponding workload proportions (W_i^c) for each faculty member then are combined into a single composite merit rating, $CR_i = \sum_c R_i^c W_i^c$, where CR_i is the weighted, overall merit rating for a faculty member, and $\sum_c W_i^c = 1$ for each faculty member. Merit pay is then computed as a function of the individual's composite rating and their relative base salary using the following formula:

$$\text{\$Merit}_i = \frac{CR_i \times PS_i}{\sum (CR_i \times PS_i)} \times MP$$

Where:

$\text{\$Merit}_i$ = Dollars of merit increase for the individual for the upcoming year.

CR_i = Composite Rating is faculty member i 's composite rating, or zero if the composite is less than 3.

PS_i = Proportion Salary is the individual's base salary divided by the total faculty base salaries for the department.

MP = Merit Pool is the total department base salaries times the Merit Rate for the year as stipulated in the AAUP Collective Bargaining Agreement.

The summation (Σ) is across all faculty members (tenured, tenure track and continuing non-tenure track)

in the Department eligible to participate in the pool. The merit pay computations result in percentage increases such that individuals with identical scores and weights receive identical percentage increases.

REQUIREMENT TO DISCLOSE

Notification to the faculty member of the salary for the academic year must contain the following: 1. Current base salary, 2. Itemized adjustments for across the board, structural, special merit, and merit pool allocations, 3. New base salary, 4. Any administrative supplements, 5. Final total salary, 6. Average Departmental composite rating score (CR). As stipulated in the CBA, faculty may request information demonstrating correspondence between merit pay and departmental ratings. This information will show the merit percentage increases corresponding to composite faculty ratings but will not divulge individual faculty salaries or evaluations.

ENTIRE AGREEMENT

This Merit Allocation Metric represents the entire agreement among the members of the faculty. It was agreed to by the eligible faculty on April 4, 2011, and replaces and supersedes all other agreements. This document may be altered by majority vote of the faculty members eligible to vote and with approval of the Chairperson and Dean.

Appraisal Period Workload Worksheet- must be agreed to during annual planning period

Faculty Name: _____

Appraisal Period February 1, 20__ through January 31, 20__

TERM	MONTHS	RESEARCH	TEACHING	SERVICE
Spring Term	9	___ % RS	___% TS (#credits x 8.33%*)	___ % SS
Fall Term		___ % RF	___% TF (#credits x 8.33%*)	___ % SF
Optional Summer Research term (See paragraph 8 of Workload Policy)	For #___ months (SRM)	___ % RJ		
COMPOSITE FOR THE EVALUATION PERIOD	Σ months = ___	___ % Research	___ % Teaching	___ % Service

*Assumes normal 12 credit per term workload is 100% teaching, excludes overload

COMPUTATION OF COMPOSITE WORKLOAD FOR THE EVALUATION PERIOD:

Compute the total number of months for the evaluation period (TM). If the Optional Summer Research Term is not used this will be 9, otherwise it will be 9 + the number of months declared for the Summer Research Term.

$$9 + SRM = TM$$

- The % Research for the Evaluation Period is calculated as:
 $\{[(\%RS + \%RF)/2 \times 9] + \%RJ \times SRM\} / TM = \% \text{ Research}$
- The % Teaching for the Evaluation Period is calculated as:
 $[(\%TS + \%TF)/2 \times 9] / TM = \% \text{ Teaching}$
- The % Service for the Evaluation Period is calculated as:
 $[(\%SS + \%SF)/2 \times 9] / TM = \% \text{ Service}$