**DOWNLOAD THIS DOCUMENT TO MAKE EDITS.**

1. **Select "File"**
2. **Select "Save As"**
3. **Select "Download a Copy**"

**\*\*\*OFFICE OF THE PROVOST UNIT POLICY TEMPLATE\*\*\***

**MERIT REVIEW**

|  |  |
| --- | --- |
| **Unit** |  |
| **Version: Faculty approved or Dean approved?** |  |
| **Date Revision Received by OTP** |  |
| **Date of OTP Approval** |  |
| **Previous version approval date** |  |

**Note: Text in bold and brackets indicates where units should develop and insert language specific to their unit practices, standards and criteria. Other text is directly from the CBA or university policy and should not be altered. Unless noted otherwise, this policy is based on Article 26 and Appendix 1 and 2 from the CBA.**

1. **GENERAL MERIT REVIEW CONSIDERATIONS**
   1. **Purpose of Merit Reviews**

Merit reviews are used to determine each eligible faculty member’s salary increase for merit based on their performance since the last merit review or the faculty member’s start date if they were hired after the last merit increase.

* 1. **Eligibility for Merit Increases**

Faculty classifications eligible for merit consideration are determined in each collective bargaining agreement. Generally, faculty in the tenure related and career related classifications are eligible for merit consideration.

All eligible faculty are eligible for consideration of the highest merit rating regardless of type of appointment or FTE.

As for all review types, any reviews for periods that include approved leave (e.g., FMLA) or other changes to workload (e.g. reductions in teaching load to take on administrative service) should evaluate only those duties assigned during that period accordingly. Faculty in these situations are eligible for highest levels of review.

All eligible faculty must be evaluated for merit and are not permitted to opt out.

* 1. **Merit Pools and Distributions**

Merit pools and dates of distribution will be established in each collective bargaining agreement with United Academics.

Merit distributions will be given as a **percentage of** **base salary**, irrespective of FTE in any given review period, and not as a flat dollar amount unless the Office of the Provost has approved a different distribution method.

* 1. **Review Policies**

Merit reviews will be based on the criteria established for performance reviews in the unit’s review and promotion policies for eligible faculty classifications.

Merit reviews will include standards for determining if the faculty member does not meet, meets, or exceeds expectations in each category relevant to their job duties, and a methodology for determining when a faculty member does not meet, meets or exceeds expectations overall based on evaluations in each of those categories.

Merit reviews will consider each faculty member’s performance since the last merit review or since their date of hire if after the last university merit distribution. The length of service over the review period may be considered in merit reviews for faculty hired since the last university merit distribution.

Merit reviews will include information from any performance, mid-term, third-year, tenure, promotion, post-tenure, or continuous employment reviews that were completed during the merit review period. The unit may request supplemental materials from each faculty member to cover any time during the merit review period that did not include any of the reviews described above.

* 1. **Joint or Multiple Appointments and Reviews**

For faculty with multiple appointments that are separate positions in separate units, there will be independent reviews for each position, with separate merit increases. For faculty with joint appointments, an MOU at time of hire should describe how reviews are to be handled.

1. **UNIT MERIT REVIEW POLICIES AND PROCEDURES**
   1. **Initiation of Merit Reviews**

**[Unit describe here process for initiating merit reviews in the unit. This should include any supplemental materials required of each faculty member and how those are reported and submitted, and deadlines for submitting those.]**

* 1. **Merit Review Process**

**[Unit describe here how merit reviews are conducted. If there is a committee (a committee is not required), how is it activated and what is the make-up of the committee? What is the role of the committee – advisory to department head? Decision-making? What is role of department head? How are final decisions made and communicated?**

**Describe what supplemental materials will be required of faculty for periods of employment that are not covered by other reviews. Describe what should be submitted, how materials are submitted and deadlines.]**

* 1. **Merit Review Ratings**

**[Unit describe here how merit ratings are determined. Specifically, how are the categories “Does not meet”, “Meets”, “Exceeds” determined for each of the categories of performance (e.g., research, teaching, service, administrative duties, professional development, contributions to diversity, equity, and inclusion)? This should be consistent with the standards of review in the review and promotion policies for each faculty classification.**

**Unit also describes how an overall rating of “Does not meet”, “Meets”, or “Exceeds” is determined based on the ratings in each of the categories relevant to a faculty member’s job duties.]**

* 1. **Merit Review Distribution**

**[Unit describe here how the overall ratings determined in Section II.C are translated into specific merit increases as a percentage of base salary]**

**APPENDICES**

**[Unit should include as appendices any templates, forms or rubrics used in determining merit. Label each appendix clearly, beginning with “Appendix A: TITLE”, etc.]**