

DEPARTMENT OF FINANCE AND ECONOMICS

FEPPS 2.03

Merit/Performance

PURPOSE

The purpose of this policy is to set forth the guidelines for merit or performance salary adjustment recommendations by both the Chair of the Department of Finance and Economics and the departmental Personnel Committee. The policy set forth below is for the guidance of the faculty under review as well as the general parameters to be used by the reviewing Chair and Committee.

UNIVERSITY POLICIES

Academic Affairs Policy & Procedure Documents:

7.10 Procedures for Awarding Merit and Performance Raises

School of Business Policy & Procedure Documents:

5.02 Faculty Evaluation

5.07 Merit/Performance

GENERAL INFORMATION

Texas State University has instituted procedures whereby salary of faculty may be adjusted from time to time based upon the performance of the obligations of the faculty member, and the level of that performance. A faculty member under review must demonstrate performance and success in each of the three major areas of review, i.e. teaching, scholarship and service. The purpose of this departmental PPS is to provide the procedure and guidelines to be used by the Chair of the Department and the Personnel Committee when determining the recommendations to be made with regard to the granting of merit or performance adjustments.

PROCEDURES

1. Evaluation Materials.

In each academic year, all departmental faculty will submit an annual activity report in accordance with CBA PPS 5.06. The document, together with any other supporting materials and student perceptions of instructor forms, will comprise the core upon which merit and performance are evaluated. Other information available to the evaluators may be utilized only if it is relevant under the provisions of this PPS.

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Merit/Performance Criteria

2. System for Evaluation.

- 2.01. During the Spring semester of each academic year, and following the submission of evaluative documents, the Chair of the Department shall convene a meeting of the Personnel Committee for the purpose of beginning the merit/performance review. Such meeting shall be held no later than the last Friday in March. The merit/performance review will be held and performance points determined even though no monies are currently designated as available or to be available for distribution.
- 2.02 at its initial merit/performance meeting the Personnel Committee will appoint three faculty (faculty advisors), at least two of whom shall be tenured faculty, to serve as advisors to the Chair of the Department. The Chair will review all appropriate documentation and prepare a summary of the performance for each faculty member. The Chair shall further identify whether each individual should be recommended for performance and/or merit, and the sum, number of steps, or level to be recommended. Following the initial determination by the Chair, the faculty advisors will meet with the Chair, review the recommendations by the Chair, and suggest any modifications or changes. The faculty advisors shall have full access to all materials used in review by the Chair and all summaries, notes and information to which the Chair referred. Following the meeting between the Chair and faculty advisors, the Chair shall call a meeting of the Personnel Committee to present the Chair's recommendations to the Committee as a whole. The Committee shall have access to all information to assist in their review and decision. In the event that the Personnel Committee disagrees with any final recommendation of the Chair, the Committee may make its proposal as a separate recommendation to the Dean of the College of Business.
- 2.03 In the event that performance and/or merit are not funded in each year, the evaluations for unfunded years shall be carried forward and shall be used as a component of the calculations for years in which funding is available. Unless otherwise required by University mandate, in years containing monies for multiple year periods, the Personnel Committee shall meet and determine the method of allocation. The point totals established for prior years shall be used, together with the review for the year in which the funds become available. In the event that in some years performance only is funded, but not merit, the intervening unfunded merit years shall be carried forward as above.
- 2.04. For evaluative purposes, the Department will utilize a point system, a copy of which is attached as Appendix A. For all categories except that of refereed journal articles, the evaluator may use a portion or all of the points for that category for any specific activity. For the purpose of evaluating refereed journal articles, however, the total points allowable for a refereed journal article shall be applied for each such article. In no event, however, will the total points for scholarly activity exceed the maximum points allowable for all scholarly activity. Refereed journal articles will normally count toward merit evaluation in the year in which accepted for publication. At the discretion of the faculty member, however, no more than two articles may be carried forward for no more than two

years following the date of acceptance. In no case will an article be counted in more than one year.

- 2.05. It is recognized by the Department that personnel cannot adequately perform their teaching or service function unless present. To that end it is the policy of the Department that faculty will be in attendance at all duly called departmental or committee meetings of which they are a member. Absence from a departmental meeting involving personnel decisions, i.e., merit, performance, tenure, promotion, and hiring, would be justified only for reasons allowable for absence from class as stipulated under the Regents Rules. The Chair and the Personnel Committee may take into consideration unauthorized absences of faculty from class or meetings in the determination of merit or performance. At the meeting of the Personnel Committee to review the Chair's recommendations, absences will be a legitimate topic for consideration and, by majority vote of the Committee, a faculty member's level of merit, or grant of performance, may be reduced or eliminated.
- 3.01. This policy shall be reviewed at least every five years. To that end, every fifth year, or upon call by the Personnel Committee, the Chair of the Department shall convene a committee of at least four tenured faculty and two non-tenured faculty to review and make recommendations. Upon return of recommendations, the Departmental Faculty under continuing contract shall meet to consider changes to the policy. A quorum for convening or continuing the meeting shall be 75% of the continuing contract faculty. Adoption of the policy shall be by majority vote of the Personnel Committee.
- 3.02 reconsideration of the merit/performance policy may be called by the Department Chair or by a majority of the Personnel Committee prior to the fixed five year review. In the event of either such call, the procedure for review shall be the same as set forth above.

Adopted by vote of the personnel committee April 12, 2002

Amended by vote of the personnel committee December 10, 2004