Promotion, Performance Review, Continued Employment and Contract Renewal Procedures for Library Faculty

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This document is a guide for the promotion and performance review process for all library faculty, who may also be referred to in this document as Career faculty. Additionally, this document provides an overview of expectation of continued employment (union-represented library faculty), and the contract renewal process (unrepresented faculty only). This document addresses this topic in accordance with Collective Bargaining Agreement (CBA) Article 19: Career Faculty Review and Promotion. For more about professional responsibilities, including professional role, service, and professional contributions, see UO Libraries Career Non-Tenure-Track Faculty (NTTF) Professional Responsibilities/Workload Policy at http://provost.uoregon.edu/content/library.

To the extent there are any discrepancies or inconsistencies, CBA Article 19 controls for represented faculty.

If review criteria change during the course of a faculty member's employment, the faculty member may elect between current criteria and those in effect during the six years prior to the initiation of a given review or promotion process.

For Career faculty holding joint appointments spanning two or more units, a memorandum will be completed at the time of hire or assignment specifying expectations for promotion review and identifying how the promotion process will be handled among the units. Please see CBA Article 16 Section 4 for further details.

For Career faculty holding multiple Career appointments, a memorandum will be completed at the time of the second or subsequent hire or assignment specifying expectations for promotion review and identifying how the promotion process will be handled among the units. Please see CBA Article 16 Section 4 for further details.

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1. Roles and Responsibilities

This section provides an overview of the roles and responsibilities of participants in the performance review, promotion, and contract renewal process, and expectation of continued employment. Union-represented faculty have an expectation of continued employment, while unrepresented faculty will have 2-3 year contracts.

1.1.   Candidates

Candidates for promotion are Career faculty librarians who are responsible for completing in a timely manner the documentation delineated in Sections 3 (Performance Reviews), 4.3 (Review for Promotion to Associate Librarian), or 4.4. (Review for Promotion to Senior Librarian). Career faculty librarians who are not represented by the United Academics bargaining unit (department heads and librarians who supervise two or more Career faculty librarians) will also be expected to participate in the contract renewal process (see Section 5).

1.2.   Associate Vice Provost and University Librarian for Central Services (AVPUL-CS)

The AVPUL-CS, or the AVPUL-CS's designee, coordinates the promotion and performance review process, as well as the contract renewal process for unrepresented faculty. The AVPUL-CS prepares the annual calendar to identify deadlines for these processes. The AVPUL-CS is responsible for managing records in keeping with UO policies and procedures.

1.2.1. AVPUL-CS and Performance Reviews

The AVPUL-CS will initiate the annual performance review process and send out the appropriate forms for employees and supervisors. They will maintain copies of these forms and ensure they are completed in a timely manner.

1.2.2. AVPUL-CS and Promotion

On behalf of the Vice Provost and University Librarian (VPUL), the AVPUL-CS initiates the promotion process by identifying candidates who are potentially eligible for promotion (which is confirmed by Central Human Resources) and by notifying the candidates and their supervisors of the documentation required for promotion files. The AVPUL-CS also provides notification, as appropriate, to the VPUL, the appropriate Associate Vice Provost and University Librarian (AVPUL), and the Library Faculty Personnel Committee (LFPC). On behalf of the VPUL, the AVPUL-CS notifies the Office of the Provost of promotion review cases by the deadline for that academic year. The AVPUL-CS assembles files and makes them digitally available to the LFPC.

The AVPUL-CS coordinates the assignment of mentors to candidates, as requested. The AVPUL-CS solicits names of recommended referees from candidates and supervisors and submits that list to the VPUL for final approval. The AVPUL-CS issues a formal request to referees, which includes a cover letter from the VPUL and promotion criteria. After referees confirm their participation, AVPUL-CS sends review file documents provided by the candidate. The AVPUL-CS will document the number of requests sent to proposed referees, the number of proposed referees who agreed to conduct reviews, and the number of proposed referees who declined the requests, if any, and will share this documentation with the LFPC. The AVPUL-CS manages the review files and coordinates submission of promotion files to the Office of the Provost.

1.2.3. AVPUL-CS and Contract Renewal (Unrepresented Faculty Only)

On behalf of the Vice Provost and University Librarian (VPUL), the AVPUL-CS initiates the contract renewal process by compiling the list of candidates up for contract renewal and by notifying the candidates and their supervisors of the documentation required. The AVPUL-CS also provides notification, as appropriate, to the VPUL, the appropriate Associate Vice Provost and University Librarian (AVPUL), and the Library Faculty Personnel Committee (LFPC). The AVPUL-CS coordinates the assignments of mentors to candidates, as requested, assembles and manages the review files, and makes them digitally available to the LFPC.

1.3.   UO Libraries Human Resources

UO Libraries Human Resources houses official faculty personnel files, which include performance review and promotion documentation. The AVPUL-CS will make previous LFPC reviews (including optional performance reviews, contract renewals, merit, and promotion materials) available to LFPC members as needed or requested. Candidates have the right to access their personnel files, except for materials they have specifically waived their rights to. For information regarding candidate access to their faculty personnel files, see UO collective bargaining agreement (CBA), Article 8.

1.4.   Mentor

A mentor is a Career faculty member who has completed promotion to Associate Librarian or Senior

Librarian, has served on the LFPC, and is from outside the individual's home department. A mentor counsels the candidate in the preparation and presentation of the review file.

1.5.   Supervisor

Supervisors will complete annual performance reviews for all direct reports (see Section 3). If the determination of the performance review is that the employee does not meet expectations in one or more of their assigned duties, the supervisor will meet with the faculty member to discuss a performance improvement plan, which will include written documentation of the areas for improvement, instructions to meet expectations in those areas, a timeline to carry out those instructions, and an explicit timeframe for assessing progress. The performance improvement plan will be signed by the supervisor, employee, and VPUL or designee.

When a Career faculty candidate is going up for promotion, supervisors will write an assessment of their performance that includes a recommendation regarding that promotion. The supervisor will also be responsible for writing an assessment of any unrepresented Career faculty candidates going up for contract renewal that includes a recommendation regarding that contract renewal. The supervisor must discuss their assessment of performance with the candidate, sign it, have the candidate sign it to acknowledge that they have read it, and then submit this signed assessment to the AVPUL-CS for inclusion in the review file. The candidate is entitled to write a response to this assessment, if they so choose, within ten business days from the date of receipt of the assessment.

The supervisor will submit a list of six referees to the AVPUL-CS. For more detailed information on how/where supervisors identify potential referees, see https://iris.uoregon.edu/cms/node/4261 and https://iris.uoregon.edu/cms/node/5805.

1.6. Associate Vice Provost and University Librarian (AVPUL)

1.6.1. AVPUL and Performance Reviews

The AVPUL will receive copies of all annual performance reviews for Career faculty who are within their reporting structure.

1.6.2. AVPUL and Promotion

The AVPUL writes an assessment of all candidates who are within their reporting structure and/or report to them who are opting for promotion.

1.6.3. AVPUL and Contract Renewal (Unrepresented Faculty Only)

The AVPUL will write a contract renewal assessment of any unrepresented candidates who are within their reporting structure and that are under direct supervision of the AVPUL.

1.7. Library Faculty Personnel Committee (LFPC)

The LFPC is an elected, standing committee of the Library Faculty, as authorized and defined in the Library Faculty and Officers of Administration (LFOA) Bylaws. Following written criteria developed by the Library Faculty, the LFPC considers the files of candidates under review for promotion or contract

renewal and provides the VPUL with a letter of review. The LFPC may request additional information from the AVPUL-CS to clarify a candidate's or supervisor's statement as needed.

Upon request the LFPC provides a written summary of referees' letters to candidates who have waived their right of access to these letters.

Optionally, candidates can request that LFPC review their progress towards promotion in interim years.

1.8. Referees

Referees are individuals who do not work at the UO Libraries and who agree to review the candidate's promotion review file and write a letter with a recommendation regarding promotion. Candidates and supervisors recommend referees. The VPUL selects referees. Candidates and supervisors are encouraged to recommend referees at peer institutions who have six or more years of experience in the candidate's area of expertise. Recommended referees may include as many as two referees from the UO who are not employed by UO Libraries, particularly if the candidate has liaison responsibilities.

Recommended referees must include some who do not have a professional relationship with the candidate, meaning referees who may have knowledge of or acquaintance with a candidate but do not currently work with the candidate in the context of their professional role in the UO Libraries; service to the UO Libraries, university, community, and/or United Academics of the University of Oregon (UAUO); or professional contributions.

For more information on referees, see Sections 4.3.4.3.; 4.3.5.1; 4.3.6.; 4.3.9.1; 4.4.4.3.; 4.4.5.1.; 4.4.6.; 4.4.9.1.; and 7.

1.9. Vice Provost and University Librarian (VPUL)

The VPUL reviews lists of suggested referees for candidates undergoing promotion review. The VPUL makes the final selection of six referees for promotion review cases, not necessarily from lists of referees compiled by the candidate or supervisor. The VPUL solicits additional comments as necessary. The VPUL evaluates promotion review files and submits final recommendation letters to the Office of the Provost.

1.10. Office of the Provost

The Office of the Provost reviews candidates' promotion review files, including the VPUL's recommendations, makes the final decision concerning promotion cases, and notifies the candidate accordingly.

2. Definitions

2.1. Professional Role: Librarianship/Archival Practice

In this document, "Professional Role" refers to the day-to-day activities and duties of librarians and archivists as defined in their position descriptions.

Librarians and archivists facilitate access to and dissemination of information in support of the

University's research and teaching mission and steward the evolving scholarly record for the benefit of scholarship and society both today and in the future.

As technology advances and the practice of knowledge creation and dissemination evolves, librarians and archivists need to be attuned to the goals, standards, and values of the research library community; to interpret these within the context of the University of Oregon; and to apply these to the development of collections and services that are most impactful to the mission.

Librarians and archivists carry a range of individual assignments as defined in their position descriptions. Their work cuts across sub-disciplines and functional specialties, and the evaluation and promotion process must recognize these differences. Areas of practical expertise for librarians and archivists may include:

- Organization and presentation of information for ease of discovery or access, in accordance with professionally accepted standards

- Delivery of information and technology through collection development and cross-institutional resource sharing

- Education of library users on ethical and effective search, evaluation, access, use/reuse, citation, and application of information and data

- Leadership or innovation regarding new services and initiatives that solve institutional or broader professional challenges within information work

Strength in librarianship and archival practice may be evidenced by candidate statements, letters of reference, student evaluations, documented achievement of goals, user feedback, external recognition, statements from administrators or colleagues, or data regarding functional improvements or impacts in library operations or services.

2.2. Service to the UO Libraries, University, and the Community

Service to the UO Libraries and the University is essential for all library faculty. "Service" here may be defined as activities that support the *internal* governance, operations, initiatives, and strategic directions of the UO Libraries and University. "Service" includes activities that occur outside of those defined in the core professional duties in one's position description. Service is further defined as activities that are conducted within the course of a normal workload and are not otherwise compensated with an overload stipend or release time. Librarians may fulfill their service responsibilities in a variety of ways, including participation in working groups, task forces, committees, and self-governance bodies. Contributions to the community beyond the University through library-related work are also appropriate. Any community service should relate to professional expertise or position in order to be included in a performance review.

Documentation of service should describe the impact of the work and the accomplishments reported. Documentation should also describe how the activities contribute to diversity, equity, and inclusion in the UO Libraries, University, or community, whenever possible. The nature of the work and accomplishments should have more emphasis than the mere number of activities undertaken. Service positions requiring a competitive selection should be indicated.

The following list provides examples of service that librarians may engage in to meet expectations for continued employment and promotion. The list should not be considered limiting, definitive, or prescriptive. Some parts of this list are more appropriate to specific academic areas than others.

- Participation in committees, task forces, and working groups in the UO Libraries
- Participation on University committees, task forces, working groups, and advisory groups
- Elected or appointed positions related to self-governance groups in the UO Libraries, such as an officer in the Library Faculty and Officers of Administration (LFOA) group
- Participation on University self-governance groups such as the University Senate
- Serving as a library union steward, representative, or elected member of the union council of the United Academics
- Authoring documents, reports, or other materials pertinent to the University's mission or operation.
- Advising or sponsoring student groups on campus.
- Assisting with grants, documents, contracts, proposals, reports, or other materials pertinent to the University's mission or operation.
- Volunteering in library-related roles in schools, community groups, and non-profit organizations
- Active participation and/or office holding in civic, educational, service, or humanitarian groups.
- Judging at science fairs, art shows, music contests, etc.; assisting educational marathons; officiating at sporting events; or similar activity as long as it relates to one's position description.

2.3. Professional Contributions: Research, Scholarship, Creative Activities and Service to the Profession

Effective librarianship requires ongoing professional engagement for librarians to stay current with new standards, developments in theory and practice, and technology. Professional contributions in the form of Research, Scholarship, Creative Activities, and Service to the Profession are a means for librarians to share their expertise, professional knowledge, and creative works to advance the mission of the UO Libraries, the University, and the library profession as a whole. These activities occur outside of those defined in one's core professional duties.

Research, Scholarship, Creative Activities, and Service to the Profession are distinct from "professional development" in this document. Professional development focuses on continuing education and learning activities. A librarian may learn new information and skills while engaged in Research, Scholarship, Creative Activities, and Service to the Profession, but the primary outcome of these activities is the sharing of expertise, research, and creative works for the benefit of others. (See Section 2.4 below: "Professional Development.")

Librarianship is an inherently interdisciplinary field, and thus no single method exists whereby librarians may contribute professionally. Distinct areas of librarianship have diverse methods of demonstrating Research, Scholarship, Creative Activities, and Service to the Profession. Participation in library and scholarly associations is also considered an important mode of Research, Scholarship, Creative Activities, and Service to the Profession. This form of professional service allows librarians to contribute their expertise to support regional consortia, to help shape the profession, to craft new standards and

practices, and to grow the profession. Service to professional associations is therefore distinct from Service to the UO Libraries, University, and Community, which, while important, is narrower in scope. (See Section 2.2 above: "Service to the UO Libraries, University, and Community.")

Documentation of Research, Scholarship, Creative Activities, and Service to the Profession should describe the impact of accomplishments reported. Documentation should also describe how the activities contribute to diversity, equity, and inclusion in the library profession, whenever possible. The nature of the accomplishment should have more emphasis than the mere number of activities undertaken. Activities requiring the exercise of professional skills and expertise should be accorded greater weight than routine or clerical tasks. For promotion, Research, Scholarship, Creative Activities, and Service to the Profession must have a clear, positive impact on the profession beyond the university, and indicate a growing expertise and professional reputation, in the judgment of professional peers.

The following list of Research, Scholarship, Creative Activities, and Service to the Profession are examples of contributions that librarians may engage in to meet expectations for continued employment and promotion. The list should not be considered limiting, definitive, or prescriptive. Some parts of this list are more appropriate to specific academic areas than others.

- Presentations at professional meetings and conferences
- Publications such as books, chapters, journal articles, essays, blog posts, reference entries, reports, and white papers
- Editorship of major publications whose contents are selected, evaluated, or synthesized by the editor
- Digital projects
- Exhibits
- Invited lectures at other universities and organizations
- Creative activity culminating in a public display or performance such as might occur in music, art, drama, poetry reading, etc.
- Participation in regional, national, and international professional organizations such as committee membership, leadership, and conference organizing appropriate to a candidate's responsibilities
- Receipt of a fellowship, grant, contract, award, prize or other indication of professional recognition.
- Development of patents or intellectual property
- Creation or development of recognized standards
- Creation/sharing of datasets
- Software development

2.4. Professional Development

The UO Libraries is committed to encouraging and supporting faculty in professional development activities that further the university's academic mission and enhance teaching, scholarship, research, creative activities, service, and equity and inclusion. A librarian who is responsive to the demands of the profession keeps abreast of the latest developments in librarianship and regularly seeks out opportunities for continuing education and training. Professional development contributes to and

furthers the knowledge base of the UO Libraries and the academic disciplines of the UO Libraries on a theoretical or practical level and enhances the intellectual and professional development of the faculty member.

The term "professional development," as used in this document, means the "activities by which library personnel purposefully seek to improve, diversify, or change their professional or job-related knowledge, attitude, or skills…" (ALA Glossary of Library and Information Science. Chicago, 1983, p.55 "Continuing Education."). Professional development activities shall be characterized as learning activities that enhance a faculty member's professional skills and competencies, and thus usually relate to the faculty member's academic discipline and job duties.

Documentation of professional development should describe the impact of the activities and how they contribute to the librarian's knowledge, skills, and abilities. The nature of the accomplishment should have more emphasis than the mere number of activities undertaken.

The following list of activities are examples of professional development that librarians may engage in to meet expectations for continued employment and promotion. The list should not be considered limiting, definitive, or prescriptive. Some parts of this list are more appropriate to specific academic areas than others.

These activities include, but are not limited to:

- Travel to conduct research and/or creative activities
- Participation in professional organizations
- Attendance at professional conferences
- Participation in professional institutes
- Participation in workshops
- Attendance at seminars
- Enrollment in credit or non-credit courses
- Training
- Work toward an additional degree or certificate
- Cross-training with others to gain increased knowledge in specialized areas within the UO Libraries
- Study and reading on a particular topic with an end product (such as an annotated bibliography or literature summary) demonstrating familiarity with the topic

2.5. Examples of Impact

Examples of Impact may include some or all of the following: cited references; altmetrics; description of impact on workflow improvements, efficiencies, improved patron experience; any data-driven documentation; deliverables; student and/or faculty evaluations; letters of support from peers and colleagues; contributions to standards or open source software contextualizing how they affect members of that subfield; and/or how contributions to service have been facilitating outreach, increasing membership, contributing to operations of university, consortia, etc.

3. Performance Review

3.1. Background and Justification

Every library faculty member deserves quality, detailed, thoughtful, accurate feedback on an ongoing basis (clearly documented at least once a year) from their direct supervisor as well as an opportunity to set realistic goals for the subsequent year. Faculty deserve every opportunity to succeed and should never be surprised by the outcome of a promotion or reappointment review when it goes through LFPC. Early career faculty, in particular, deserve quality guidance, mentoring, and support, and when gaps in performance are apparent, should receive the resources and feedback necessary to develop in those areas.

Accordingly, all UO librarians will go through a process of performance review "for the purpose of determining if the faculty member is meeting the standard of excellence appropriate to a Career instructional or Career research faculty member at an AAU institution based on their job duties" (CBA Article 19, Section 3). "Performance reviews should be designed to help Career faculty members grow as educators, scholars, and researchers, as appropriate; identify areas of strength; and identify areas that need improvement associated with their position" (CBA Article 19, Section 3). Additionally, "Performance reviews must include a determination if the faculty member meets, exceeds, or does not meet expectations in their assigned duties (CBA Article 19, Section 6).

Thus, the annual performance review should be a conversation between supervisor and employee framed around constructive, supportive feedback and professional growth. It should not be punitive.

3.2. Timeline

a. Performance reviews take place on an academic-year basis and should be completed by Sept. 30 of the year.

b. Librarians who choose an additional optional review by LFPC must submit their materials to LFPC no later than Oct. 1. See below Section 3.6 for a description of the Optional LFPC Review.

c. Performance reviews may take place out of cycle when a department or unit head has identified or become aware of performance problems. The department or unit head shall meet with the Career faculty member to discuss areas of concern and evaluate whether a formal performance review is warranted (CBA Article 19, Section 4c).

3.3. Template Form for Employees and Supervisors

The Career Faculty Librarian Performance Review Form [See Appendix A] provides a structured format for librarians to enter brief narrative descriptions (around 250 words per area) of their activities, accomplishments, and impact in each of the three core areas: Professional Role; Service to the UO Libraries, University, and Community; Research, Scholarship, Creative Activities, and Service to the Profession; and, if applicable, professional development. The form also provides sections related to goals, which will allow librarians to set annual goals, chart progress, identify challenges, and receive regular feedback from their supervisors.

3.4. Procedures

a. Faculty employee completes the Career Faculty Librarian Performance Review Form as aligned with their position description.

b. Faculty employee submits the following documents to their supervisor:

   i. Completed Career Faculty Librarian Performance Review Form

   ii. Current position description. If the employee has substantially changed their position within the review period, prior position description(s) should also be included.

   iii. Updated c.v., signed

   iv. Any supplemental documents the faculty employee wishes to include, such as teaching evaluations, peer evaluations. Evidence of impact, kudos, thank you letters (optional)

c. Supervisor reviews employee's form and any supplemental documentation. Following the criteria in Section 3.7, supervisor provides an evaluation of "meets/exceeds/does not meet expectations" in each of the three core areas: Professional Role; Service to the UO Libraries, University, and Community; Research, Scholarship, Creative Activities, and Service to the Profession; and, if applicable, professional development. Supervisor will also provide comments in the space provided to further explain the evaluation rating.

d. Employee and supervisor meet to discuss goals, accomplishments, challenges, and feedback.

e. Both employee and supervisor sign the form.

f. Supervisor submits performance evaluation to UO Libraries HR and copies AVPUL for the employee's division.

g. Documents are placed in employee's personnel file.

3.5. Employee Response in the Event of a "Does Not Meet Expectations" Evaluation

a. An employee who receives a "does not meet expectations" evaluation in any area of their performance may submit a written response within ten business days from the date of the performance review to provide additional information. This written response may be added to the employee's performance review dossier in their personnel file.

b. An employee who receives a "does not meet expectations" evaluation in any area of their performance must receive, in writing, a performance improvement plan, which will include written documentation of the areas for improvement, instructions to meet expectations in those areas, a timeline to carry out those instructions, and an explicit timeframe for assessing progress, and will have a meeting with their supervisor to discuss the performance improvement plan as per CBA Article 19, Section 6e. At the request of either party, this may be developed with the input of Library Human Resources.

3.6. Optional LFPC Review

Librarians may choose to submit their performance review materials to the Library Faculty Personnel Committee for an additional peer evaluation with feedback as to progress toward promotion. Review by the LFPC is optional and intended for the employee to seek constructive feedback. The review is private between the employee and the LFPC. The evaluation is not binding and may not be used for or against the employee in any future performance review or promotion process. The Optional LFPC Review is available for librarians who are within two years of eligibility for promotion to Associate or Senior Librarian.

3.7. Evaluation Criteria

Per CBA Article 19, Section 5, "Career faculty members will be evaluated only by the criteria approved and made available to the faculty member."

The following set of guidelines (hereafter called rubrics) are made available as general guides for rating and evaluation in each of the major areas included in position descriptions. Not all positions will include distinct Research, Scholarship, Creative Activities, and Service to the Profession, and Professional Development areas and employees and supervisors may consider them combined using their best judgment. In addition, these rubrics are not intended to cover all of the possible contributions to consider. They should also not be used to define or quantify criteria for evaluation. Neither the LFPC, supervisor, AVPUL, nor VPUL should use these guidelines as a means to compare librarians to one another during evaluation.

3.7.1. Use of Position Descriptions for Evaluation in Performance Reviews

A general definition of "Professional Role: Librarianship/Archival Practice" is available in Section 2.1. However, a universal set of performance review criteria is neither feasible nor useful for librarians who engage in very different kinds of duties in their professional roles, employees and supervisors should refer to individuals' position descriptions as the primary guides for individual performance evaluation. In the review process, an employee can ask, "How well am I meeting the expectations of my own position description?" Likewise, supervisors can use the position description as a guide and measure in determining how well an employee is meeting expectations.

The paramount criterion leading to promotion, continuing appointment, and contract renewal is effectiveness in the professional, that is, carrying out the responsibilities of one's position. No advancement can occur when position effectiveness is inadequate. A superior record in Research, Scholarship, Creative Activities, and Service to the Profession and in Service to the UO Libraries, University, and Community may not be used to offset a poor record of position effectiveness in the UO Libraries. Nevertheless, position effectiveness alone, no matter how superior, without evidence of some level of engagement in Research, Scholarship, Creative Activities, and Service to the Profession, and in Service to the UO Libraries, University, and Community will not be sufficient to secure promotion, continuing appointment, or contract renewal.

3.7.2. General Rubric for Evaluation in Performance Review, Contract Renewal, and Promotion: Professional Role: Librarianship/Archival Practice

The following general rubric shall be used to guide evaluation in performance reviews in the area of Professional Role: Librarianship/Archival Practice

Does Not Meet Expectations	Meets Expectations	Exceeds Expectations
Examples of performance that does not meet expectations include but are not limited to: • Lack of continued contributions toward the library's mission and/or goals • Lack of meaningful documentation of the contributions of the individual librarian • Lack of meaningful documentation of impact made by the librarian's contributions • Lack of evidence of effective accomplishment of professional responsibilities outlined in the individual librarian's position description • Lack of evidence as to completion of individual goals in annual performance review process	Examples of performance that meets expectations include but are not limited to: • Consistently makes contributions toward the library's mission and/or goals • Provides meaningful documentation of the contributions of the individual librarian • Provides meaningful documentation of impact made by the librarian's contributions • Provides evidence of effective accomplishment of professional responsibilities outlined in the individual librarian's position description • Provides evidence of completion or significant progress toward individual goals as determined in annual performance review process	Examples of performance that exceeds expectations include but are not limited to: • Contributes to a greater degree than expected to achieving the library's mission and/or goals • Provides meaningful documentation of outstanding impact made by the librarian's contributions • Provides evidence of exceptional accomplishment of professional responsibilities outlined in the individual librarian's position description • Provides evidence of completing significant and unexpected goal during the performance cycle, while successfully completing all originally established goals in the work plan

3.7.3. General Rubric for Evaluation in Performance Review, Contract Renewal, and Promotion: Research, Scholarship, Creative Activities, and Service to the Profession

The following general rubric shall be used to guide evaluation in performance reviews in the area of Research, Scholarship, Creative Activities, and Service to the Profession.

Does Not Meet Expectations	Meets Expectations	Exceeds Expectations
Examples of performance that does not meet expectations include but are not limited to: • Lack of documentation of meaningful research, scholarship, creative activities, and service to the profession of the individual librarian • Lack of documentation of	Examples of performance that meets expectations include but are not limited to: • Consistently engages in research, scholarship, creative activities, and service to the profession • Provides documentation of meaningful research, scholarship, creative	Examples of performance that exceeds expectations include but are not limited to: • Engages to a greater degree than expected in research, scholarship, creative activities, and service to the profession • Provides documentation of outstanding and

meaningful impact made by the librarian's research, scholarship, creative activities, and service to the profession • Research, scholarship, creative activities, and service to the profession do not align with librarian's professional role and/or library's mission • Lack of evidence as to completion of individual goals in annual performance review process	activities, and service to the profession of the individual librarian • Provides meaningful documentation of impact made by the librarian's research, scholarship, creative activities, and service to the profession • Research, scholarship, creative activities, and service to the profession align with librarian's professional role and/or library's mission • Provides evidence of completion or significant progress toward individual goals as determined in annual performance review process	meaningful impact made by the librarian's research, scholarship, creative activities, and service to the profession • Provides evidence of completing significant and unexpected goal during the performance cycle, while successfully completing all originally established goals in the work plan

3.7.4. General Rubric for Evaluation in Performance Review, Contract Renewal, and Promotion: Service to the UO Libraries, University, and Community

The following general rubric shall be used to guide evaluation in performance reviews in the area of Service to the UO Libraries, University, and Community.

Does Not Meet Expectations	Meets Expectations	Exceeds Expectations
Examples of performance that does not meet expectations include but are not limited to: • Lack of service activities • Lack of documentation of meaningful service activities of the individual librarian • Lack of documentation of meaningful impact made by the librarian's service activities • Service activities do not align with librarian's professional role and/or	Examples of performance that meets expectations include but are not limited to: • Consistently engages in service activities • Provides documentation of meaningful service activities of the individual librarian • Provides documentation of meaningful impact made by the librarian's service activities • Service activities align with librarian's	Examples of performance that exceeds expectations include but are not limited to: • Engages to a greater degree than expected to in service activities • Provides documentation of outstanding and meaningful impact made by the librarian's service activities • Provides evidence of completing significant and unexpected service activity during the

the library's mission
- Lack of evidence as to completion of individual goals in annual performance review process

professional role and/or the library's mission
- Provides evidence of completion or significant progress toward individual goals as determined in annual performance review process

performance cycle, while successfully completing all originally established goals in the work plan

3.7.5. General Rubric for Evaluation in Performance Review, Contract Renewal, and Promotion: Professional Development [where applicable]

The following general rubric shall be used to guide evaluation in performance reviews in the area of Professional Development.

Does Not Meet Expectations	Meets Expectations	Exceeds Expectations
Examples of performance that does not meet expectations include but are not limited to: - Does not regularly engage in activities that advance their education or professional knowledge - Lack of meaningful documentation of impact from professional development activities - Professional development activities do not align with librarian's core professional duties and/or goals - Lack of evidence as to completion of individual goals in annual performance review process	Examples of performance that meets expectations include but are not limited to: - Regularly engages in activities that advance their education or professional knowledge - Provides meaningful documentation of impact from professional development activities - Professional development activities align with librarian's core professional duties and/or goals - Provides evidence of completion or significant progress of individual goals as determined in annual performance review process	Examples of performance that exceeds expectations include but are not limited to: - Engages in professional development activities with rigorous requirements, unusual demands, and/or competitive selection - Provides meaningful documentation of exceptional impact from professional development activities - Provides evidence of completing significant and unexpected professional development activity during the performance cycle, while successfully completing all originally established goals in the work plan

4. Promotion

Promotion to associate and senior librarian is elective. An unsuccessful candidate for promotion may continue employment at their current rank as long as eligible to do so. Career faculty who are denied

promotion may reapply for promotion after having been employed by the university for an additional three years at an average of 0.5 annualized FTE per year, accrued at no greater than three terms per academic year for bargaining unit faculty on 9-month appointments, and at four terms per year for bargaining unit faculty on 12-month appointments.

4.1. Credit Towards Promotion and Rank at Hire

When credit for prior service is agreed upon, the terms of hire will state the number of years of credit granted and the earliest date for promotion eligibility. This is negotiated between the candidate upon hire with the VPUL. LFPC will be consulted when a position is eligible for hire at multiple ranks.

4.2. Timeline

4.2.1. Summer Term

The AVPUL-CS identifies candidates that are potentially eligible for promotion (which is confirmed by Central Human Resources) and notifies them, their supervisors, and as appropriate, the relevant AVPUL, of the documentation required for review files. The AVPUL-CS coordinates the assignment of mentors to candidates who opt for that service. Candidates prepare documentation required for review files and submit it to the AVPUL-CS in the first weeks of fall term.

4.2.2. Fall Term

During fall term, the VPUL identifies referees for candidates for promotion review, taking into consideration recommendations provided by the candidate and supervisor. The AVPUL-CS contacts referees to solicit participation, sends them promotion-review file documents, and adds referees' letters of evaluation to the review files. The AVPUL-CS will document the number of requests sent to proposed referees, the number of proposed referees who agreed to conduct reviews, and the number of proposed referees who declined the requests, if any, and will share this documentation with the LFPC. Supervisors complete letters of evaluation and submit them to the AVPUL-CS. AVPULs complete evaluations of individuals within their reporting structure and submit them to the AVPUL-CS.

4.2.3. Winter Term

At the end of fall term, and throughout winter term, the LFPC reviews promotion review files and solicits additional documentation as necessary via the AVPUL-CS. The AVPUL-CS will make previous review documents (including optional performance reviews, contract renewals, merit, and promotion materials) available to LFPC members as needed or requested. The LFPC writes letters of recommendation to the VPUL and submits these letters to the AVPUL-CS for inclusion in the review files.

4.2.4. Spring Term

At the end of winter term and the beginning of spring term, the VPUL reviews the completed promotion review files and writes letters of recommendation which the AVPUL-CS adds to the review files. The VPUL shares their letter of recommendation with the candidate and allows the candidate ten days from the date of receipt of the letter to provide responsive material or

information, which shall be included in the evaluation file. During spring term, the AVPUL-CS submits on behalf of the VPUL the completed promotion review files to the Office of the Provost. The provost subsequently notifies candidates of promotion decisions and of the appeal process.

4.3. Associate Librarian

4.3.1. Criteria for Promotion to Associate Librarian

A candidate who has held the rank of assistant librarian for six or more years, or sooner, if they were hired with credit for prior service, may consider promotion review to associate librarian. Definitions for Research, Scholarship, Creative Activities, and Service to the Profession, and Service to the UO Libraries, University, and Community are available in Section 2, and rubrics for evaluation are available in Section 3.7. The rubrics shall be considered suggested guidelines for evaluation and not a rating system. Neither the candidate's supervisor, the LFPC, external reviewers, nor the VPUL shall assign a rating to candidates for promotion.

A candidate for promotion from assistant librarian to associate librarian is expected:

To have made significant achievements in their professional role in the UO Libraries, as identified in their position description, and to have contributed to the UO Libraries' strategic agenda. A rubric for evaluation of the professional role is available in Section 3.7.2.

To have provided service to the UO Libraries, university, and community that is characterized by successful leadership, produces a strong positive impact, and/or results in public credit to the library and to the university. Any community service should relate to professional expertise or position. A full definition of Service to the UO Libraries, University, and Community is available in Section 2.2, and a rubric for evaluating service is available in Section 3.7.4.

To have made significant professional contributions through Research, Scholarship, Creative Activities, and Service to the Profession such as those described in Section 2.3. A rubric for evaluating Research, Scholarship, Creative Activities, and Service to the Profession is available in Section 3.7.3. Contributions must have a clear, positive impact on the profession beyond the university, and indicate a growing expertise and professional reputation, in the judgment of their professional peers.

4.3.2. Description of the Process

The review for promotion to associate librarian may be sought during the sixth year of initial employment or earlier if the employee received credit upon hire. It includes submission of letters by referees from outside the UO Libraries, including referees who do not have a professional relationship with the candidate.

The candidate is strongly encouraged to work with a mentor for the promotion process (see 1.4). Mentors can provide advice on waiver options and file preparation.

The candidate receives notification from the AVPUL-CS that the promotion review file has been sent to the Office of the Provost. The candidate also receives copies of recommendation letters, unless right of access has been waived (please see Section 4.3.4.2 for more information). The candidate

receives a letter from the provost indicating final disposition. The successful candidate receives promotion in rank to associate librarian and an appropriate salary increase of at least 8% of base salary (CBA, Article 26, Section 6).

An unsuccessful candidate may continue employment at their current rank as long as eligible to do so under the CBA. Candidates denied promotion may reapply after having been employed by the university for an additional three years.

4.3.3. Action Items for Review File

a. The AVPUL-CS notifies the VPUL if referees are unable to complete letters and the VPUL identifies alternate referees.

b. Each confirmed referee reviews the documentation in the promotion review file provided by the AVPUL-CS and writes a letter with a recommendation regarding promotion.

c. The candidate's supervisor reviews the promotion review file and writes a supervisor statement.

d. The AVPUL for that candidate's division reviews the promotion review file and writes a letter of evaluation.

e. The LFPC writes a letter of review with a recommendation for or against promotion based on its consideration of the completed review file.

f. The VPUL writes a letter of recommendation taking into consideration the LFPC assessment and the candidate's review file.

g. The provost or their designee makes the final determination for the case.

4.3.4. Documentation Required from Candidate

4.3.4.1. Election of Promotion Review Form

A candidate wishing to seek promotion to associate librarian must complete and return an election of promotion review form to the AVPUL-CS by the deadline.

4.3.4.2. Waiver Option Form

A candidate completes the appropriate waiver option form to waive or retain legal right of access to review file material, as described below.

Option #1: Non-Waiver

The candidate retains the right of access to all material in the promotion review file.

Option #2: Full Waiver

The candidate waives the right of access to all material in the promotion review file. The

candidate may not request UO-affiliated review letters that were not shared by the reviewer during the process. The candidate may request from the LFPC a written summary of both UO-affiliated and non-UO affiliated referees' letters. The summary should not identify the referees or provide information from which the referees may be identified.

Option #3: Partial Waiver

The candidate waives the right of access to non-UO affiliated referees' letters but retains the right of access to other material in the promotion review file, including UO-affiliated review letters.

The candidate may request from the LFPC a written summary of non-UO affiliated referees' letters. The summary should not identify the non-UO affiliated referees or provide information from which these referees may be identified.

4.3.4.3. List of Referees

The candidate submits a list of six possible referees. The list includes each referee's name, title, and email address, as well as a brief explanation of why the referee was selected. The list must include some referees who do not have a professional relationship with the candidate, meaning referees who may have knowledge of or acquaintance with a candidate but do not currently work with the candidate in the context of their professional role in the UO Libraries; service to the UO Libraries, university, community, and/or UAUO; or through Research, Scholarship, Creative Activities, and Service to the Profession. Referees should be able to evaluate the strength and impact of the candidate's professional activities in their area of expertise. A candidate is encouraged to suggest referees at peer institutions (see Section 7), as determined by the VPUL and supervisor, who have six or more years of experience in the candidate's area of expertise. The list may include as many as two referees from the UO who are not employed by UO Libraries who have had extended interaction with the candidate in a professional context.

4.3.4.4. Candidate Statement

The candidate writes a statement of 5-10 pages that describes their accomplishments (see CBA, Article 19, Section 14), their impact, as well as contributions to institutional equity and inclusion. The statement should address major accomplishments and their impact since hire in the areas of professional role in the UO Libraries; Service to the UO Libraries, University, Community, and/or UAUO); and Research, Scholarship, Creative Activities, and Service to the Profession. The statement should narrate and provide evidence of the candidate's growing expertise and professional reputation, to support the evaluation of this key criteria outlined in this document. If the candidate received credit towards promotion to associate librarian upon hire, they should also briefly describe their accomplishments in these areas at their previous institution that warranted receiving credit. If the candidate's position at UO changed substantially during the review period, the candidate should briefly describe those changes and include accomplishments they achieved within each role.

For more information on the areas of work performed by Career faculty librarians, and the typical breakdown in percentages, see *"NTTF Professional Responsibilities"* at

http://provost.uoregon.edu/content/library. The quality and impact of an individual's accomplishments are most important. For examples of impact, please see Section 2.5 in this document.

In evaluating the performance of required professional development activities, the review will consider the availability of professional development funds, opportunities for professional development, and the Career faculty member's efforts to secure funding (CBA, Appendix 2).

The statement should be engaging and understandable to those unfamiliar with the candidate's work and responsibilities. Acronyms should be spelled out. Descriptions of committee service should include the committee's charge and the candidate's involvement. The **UO Style Guide** (https://communications.uoregon.edu/editorial-style-guide) https://communications.uoregon.edu/editorial-style-guidehttps://communications.uoregon.edu/editorial-style-guidehttps://communications.uoregon.edu/editorial-style-guideshould be used as the authority for capitalization, proper names, punctuation, and other style and grammar issues.

This document must be signed and dated.

4.3.4.5. Position Description

If the employee has substantially changed their position within the review period, prior position description(s) should also be included.

 This document must be signed and dated.

4.3.4.6. Curriculum Vitae

This document must be signed and dated. For examples, see: https://iris.uoregon.edu/cms/node/4843

4.3.4.7. Evidence of Instruction (if applicable)

A candidate who has taught a credit class, non-credit courses such as workshops, and/or engaged in other pedagogical activity may submit a summary of course evaluations and/or other evidence of instruction resulting from that activity.

4.3.4.8. Statements of Appreciation (optional)

The candidate may submit for the review file statements of appreciation from those with whom they have worked in a professional capacity.

4.3.4.9. Supplementary Materials

The candidate's dossier must include copies of supplementary materials in the following categories: Research, Scholarship, Creative Activities, and Service to the Profession; Teaching Activities (if applicable); and Equity and Inclusion materials. For more details see the following: https://iris.uoregon.edu/cms/sites/default/files/digital_dossier_tips_0.pdf

4.3.4.10. Other Material (Optional)

Unsolicited statements from those with whom the candidate has worked in a professional capacity may be received for the candidate undergoing review and placed in the review file. The AVPUL-CS notifies the candidate when such material is received.

4.3.5. Documentation Required from Supervisor

4.3.5.1. List of Referees

The supervisor submits a list of six possible referees. The list includes each referee's name, title, and email address, as well as a brief explanation of why the referee was selected. The list must include some referees who do not have a professional relationship with the candidate, meaning referees who may have knowledge of or acquaintance with a candidate but do not currently work with the candidate in the context of their professional role in the UO Libraries; Service to the UO Libraries, University, Community, and/or UAUO; or within the context of Research, Scholarship, Creative Activities, and Service to the Profession. Referees should be able to evaluate the strength and impact of the candidate's professional activities in their area of expertise. The supervisor is encouraged to suggest referees at peer institutions (see Section 7) who have six or more years of experience in the candidate's area of expertise.

4.3.5.2. Supervisor Statement

Upon review of the promotion file, the supervisor writes a statement that provides a qualitative assessment of the candidate's accomplishments and performance of all professional responsibilities since initial professional appointment here or elsewhere. For more information on the areas of work performed by Career faculty librarians, and the typical breakdown in percentages, see *"NTTF Professional Responsibilities"* at http://provost.uoregon.edu/content/library.

The assessment should address how accomplishments and performance align with the library's strategic agenda. The statement should conclude with a recommendation for promotion or non-promotion. Before submitting the supervisor statement, the supervisor must discuss the assessment with the candidate, sign the statement, and have the statement signed by the candidate to acknowledge the discussion. The candidate may respond in writing to the review within ten business days from the date of the receipt of the letter and include this in their documentation.

The supervisor should be mindful that the statement will be reviewed by those unfamiliar with the candidate's work and responsibilities. Acronyms should be spelled out. The **UO Style Guide** (https://communications.uoregon.edu/editorial-style-guide) should be used as the authority for capitalization, proper names, punctuation, and other style and grammar issues.

4.3.5.3. Statement on Subject or Functional Specialist Responsibilities (from AVPUL or other)

For a candidate with subject or functional specialist responsibilities, e.g., collection development responsibilities, the supervisor requests an assessment of performance of these responsibilities from one or more of the following: AVPUL for Research, Instruction, and Access

Services, appropriate Collection Fund Manager, academic department liaison, and/or an academic department faculty. This statement, which may be brief, should be referenced in the supervisor statement.

4.3.6. Documentation Required from Referees

Each referee writes a letter based on review of promotion review file documentation provided by AVPUL-CS and concludes with a recommendation regarding promotion. Although six referees are selected and a minimum of six referee letters are solicited, receipt of all six letters may not be possible in the allotted timeframe, therefore, a minimum of three completed letters is required as part of final documentation for the review; at least one letter should be from a referee not submitted by the candidate seeking promotion (i.e. non-indicated). The completed letters should provide commentary that is representative overall of the three areas under review, as applicable: professional role, Service to the UO Libraries, University, and Community; Research, Scholarship, Creative Activities, and Service to the Profession; and if applicable, professional development.

4.3.7. Documentation Required from AVPUL

The AVPUL writes a letter based on review of the promotion review file of a candidate within their reporting structure, including referee letters and supervisor statement, and concludes with a recommendation regarding promotion. The AVPUL submits the letter to UO Libraries HR and copies the candidate and their supervisor. The candidate may respond in writing to the AVPUL review within ten business days from the date of receipt of the letter and include this in their documentation.

If the AVPUL is the supervisor, the AVPUL letter is not required.

4.3.8. Documentation Required from LFPC

The LFPC writes a letter of review based on its consideration of the candidate's review file, including all reviews in 4.3.5 through 4.3.7. In the letter the LFPC evaluates the candidate's performance in relation to the criteria for promotion and provides a recommendation regarding promotion.

4.3.9. Documentation Required from VPUL

4.3.9.1. Final List of Referees

The final list of referees is determined by the VPUL and may include individuals other than those recommended by the candidate or the supervisor. If referees decline to review or do not respond by the given deadline, the AVPUL-CS notifies the VPUL, who finds alternate referees.

4.3.9.2. Letter of Recommendation Regarding Promotion

The VPUL writes a letter based on review of the candidate's promotion review file and concludes with a recommendation regarding promotion. The VPUL is responsible for evaluating the candidates' file and for evaluating the review process up to that point, including supervisor, AVPUL and LFPC letters, for evidence of compliance with policy and regulation and objectivity, and will consider any special circumstances, policy deviations, and a candidate's history of

performance feedback, in formulating a recommendation to the provost. The VPUL shares their letter of recommendation with the candidate and allows the candidate ten business days from the date of receipt of the letter to provide responsive material or information, which shall be included in the evaluation file.

4.4. Senior Librarian

4.4.1. Criteria for Promotion to Senior Librarian

A candidate who has held the rank of associate librarian for six or more years, or sooner, if they were hired as an associate librarian with credit for prior service, may consider promotion review to senior librarian at any point of their tenure with UO Libraries, aligned with the UO Libraries' timeline for promotion.

A candidate considering promotion to senior librarian must meet a set of standards that are more rigorous and qualitatively higher than those for promotion to associate librarian. This rank is awarded only upon the achievement of high professional stature, accomplishment, and service that is widely recognized within the profession and the university community.

In this review, a candidate must show a coherent record of achievement characterized by significant impact and qualitative progress beyond the work that earned the promotion to associate librarian.

Definitions for Research, Scholarship, Creative Activities, and Service to the Profession; and Service to the UO Libraries, University, and Community are available in Section 2. Rubrics for evaluation of Research, Scholarship, Creative Activities, and Service to the Profession; and Service to the UO Libraries, University, and Community are available in Section 3.7.3 and Section 3.7.4, respectively. The rubrics shall be considered suggested guidelines for evaluation and not a rating system. Neither the candidate's supervisor, the LFPC, external reviewers, nor the VPUL shall assign a rating to candidates for promotion.

A candidate for promotion to senior librarian is expected:

a. To have established a record of solid, lasting accomplishment in their professional role in the UO Libraries, as identified in their position description, and to have contributed to the UO Libraries' strategic agenda. A rubric for evaluation of the professional role is available in Section 3.7.2.

b. To have provided service to the UO Libraries, university, and community that is characterized by successful leadership, produces a strong positive impact, and/or results in public credit to the library and to the university. Any community service should relate to professional expertise or position. A full definition of Service to the UO Libraries, University, and Community is available in Section 2.2, and a rubric for evaluating service is available in Section 3.7.4.

c. To have made outstanding professional contributions through Research, Scholarship, Creative Activities, and Service to the Profession such as those described in Section 2.3. A rubric for evaluating Research, Scholarship, Creative Activities, and Service to the Profession is available in Section 3.7.3. Contributions must be widely regarded as having a clear, positive, far-

reaching impact on the profession, and indicate wide recognition by their professional peers as an expert and leader in their areas of competence.

4.4.2. Description of the Process

a. Review for promotion to senior librarian is optional and may be initiated after six years in the rank of associate librarian, or sooner, if initial contract indicates credit toward an earlier review (see Section 4.1).

b. An individual who is considering promotion review should consult regularly with their immediate supervisor to determine readiness for promotion review.

c. The candidate is strongly encouraged to work with a mentor for the promotion process (see 1.4). Mentors can provide advice on waiver options and file preparation.

d. The candidate receives notification from the AVPUL-CS that the promotion review file has been sent to the Office of the Provost. The candidate may request copies of recommendation letters, unless right of access has been waived. A successful candidate receives a letter from the provost that specifies a promotion in rank to senior librarian and the related salary increase. Failure to achieve promotion does not in and of itself jeopardize one's employment and does not preclude future attempts at promotion.

4.4.3. Action Items for Review File

a. The AVPUL-CS notifies the VPUL if referees are unable to complete letters and the VPUL identifies alternate referees.

b. Each confirmed referee reviews the documentation in the promotion review file provided by the AVPUL-CS and writes a letter with a recommendation regarding promotion.

c. The candidate's supervisor reviews the promotion review file and writes a supervisor statement and recommendation.

d. The AVPUL for that candidate's division reviews the promotion review file and writes a letter of evaluation and recommendation.

e. The LFPC writes a single letter of review with a recommendation for or against promotion based on its consideration of the candidate's review file.

f. The VPUL writes a letter of recommendation taking into consideration the LFPC assessment and the candidate's review file.

g. The provost or their designee makes the final determination for the case.

4.4.4. Documentation Required from Candidate

4.4.4.1 Election of Promotion Review Form

A candidate for promotion to senior librarian must complete and return an election of promotion review form to the AVPUL-CS by the due date established in the annual timeline.

4.4.4.2. Waiver Option Form

A candidate completes the appropriate waiver option form to waive or retain legal right of access to review file material, as described below.

Option #1: Non-Waiver

The candidate retains the right of access to all material in the promotion review file.

Option #2: Full Waiver

The candidate waives the right of access to all material in the promotion review file. The candidate may not request UO-affiliated review letters that were not shared by the reviewer during the process. The candidate may request from the LFPC a written summary of all referees' letters. The summary should not identify the referees or provide information from which the referees may be identified.

Option #3: Partial Waiver

The candidate waives the right of access to non-UO affiliated referees' letters but retains the right of access to other material in the promotion review file, including UO affiliated referees' letters.

The candidate may request from the LFPC a written summary of non-UO affiliated referees' letters. The summary should not identify the non-UO affiliated referees or provide information from which these referees may be identified.

4.4.4.3. List of Referees

The candidate submits a list of six possible referees. The list includes each referee's name, title, and email address, as well as a brief explanation of why the referee was selected. The list must include some referees who do not have a professional relationship with the candidate, meaning referees who may have knowledge of or acquaintance with a candidate but do not currently work with the candidate in the context of their professional role in the UO Libraries; Service to the UO Libraries, University, Community, and/or UAUO; or Research, Scholarship, Creative Activities, and Service to the Profession. Referees should be able to evaluate the strength and impact of the candidate's professional activities in their area of expertise. A candidate is encouraged to suggest referees at peer institutions (see Section 7), as determined by the VPUL and supervisor, who have six or more years of experience in the candidate's area of expertise. The list may include up to two names of referees from the UO who are not employed by UO Libraries, particularly if the candidate has subject liaison responsibilities.

4.4.4.4. Candidate Statement

The candidate writes a statement of 5-10 pages that describes their accomplishments (see CBA,

Article 19, Section 14), their impact, as well as contributions to institutional equity and inclusion. The statement should address major accomplishments and their impact since hire in the areas of professional role in the UO Libraries; Service to the UO Libraries, University, Community, and/or UAUO); and Research, Scholarship, Creative Activities, and Service to the Profession. The statement should narrate and provide evidence of the candidate's growing expertise and professional reputation, to support the evaluation of this key criteria outlined in this document. If the candidate received credit towards promotion to associate librarian upon hire, they should also briefly describe their accomplishments in these areas at their previous institution that warranted receiving credit. If the candidate's position at UO changed substantially during the review period, the candidate should briefly describe those changes and include accomplishments they achieved within each role.

For more information on the areas of work performed by Career faculty librarians, and the typical breakdown in percentages, see *"NTTF Professional Responsibilities"* at http://provost.uoregon.edu/content/library. Quality and impact of an individual's accomplishments are most important. See Section 2.5 for examples of impact.

In evaluating the performance of required professional development activities, the review will consider the availability of professional development funds, opportunities for professional development, and the Career faculty bargaining unit member's efforts to secure funding (CBA, Appendix 2).

The statement should be written to engage and be understood by those unfamiliar with the candidate's work and responsibilities. Acronyms should be spelled out. Descriptions of committee service should describe the committee's charge and the candidate's involvement. The **UO Style Guide** (https://communications.uoregon.edu/editorial-style-guide) should be used as the authority for capitalization, proper names, punctuation, and other style and grammar issues.

This document must be signed and dated.

4.4.4.5. Position Description

If the employee has substantially changed their position within the review period, prior position description(s) should also be included.

 This document must be signed and dated.

4.4.4.6. Curriculum Vitae

 This document must be signed and dated. For examples, see: https://iris.uoregon.edu/cms/node/4843)

4.4.4.7. Evidence of Instruction (if applicable)

A candidate who has taught a credit class, non-credit courses such as workshops, and/or engaged in other pedagogical activity may submit a summary of course evaluations and/or other evidence of instruction resulting from that activity.

4.4.4.8. Statements of Appreciation (optional)

The candidate may submit for the review file statements of appreciation from those with whom they have worked in a professional capacity.

4.4.4.9. Supplementary Materials

The candidate's dossier must include copies of supplementary materials in the following categories: Research, Scholarship, Creative Activities, and Service to the Profession; Teaching Activities (if applicable), and Equity and Inclusion materials. For more details see the following: https://iris.uoregon.edu/cms/sites/default/files/digital_dossier_tips_0.pdf

4.4.4.10. Other Material (optional)

Unsolicited statements from those with whom the candidate has worked in a professional capacity may be received for the candidate undergoing review and placed in the review file. The AVPUL-CS notifies the candidate when such material is received.

4.4.5. Documentation Required from Supervisor

4.4.5.1. List of Referees

The supervisor submits a list of six possible referees. The list includes each referee's name, title, and email address, as well as a brief explanation of why the referee was selected. The list must include some referees who do not have a professional relationship with the candidate, meaning referees who may have knowledge of or acquaintance with a candidate but do not currently work with the candidate in the context of their professional role in the UO Libraries; Service to the UO Libraries, University, Community, and/or UAUO; or within the context of Research, Scholarship, Creative Activities, and Service to the Profession. Referees should be able to evaluate the strength and impact of the candidate's professional activities in their area of expertise. The supervisor is encouraged to suggest referees at peer institutions (see Section 7) who have six or more years of experience in the candidate's area of expertise.

4.4.5.2. Supervisor Statement

Upon review of the promotion file, including referees' letters, the supervisor writes a statement that provides a qualitative assessment of the candidate's accomplishments and performance of all professional responsibilities since initial professional appointment here or elsewhere. For more information on the areas of work performed by Career faculty librarians, and the typical breakdown in percentages, see *"NTTF Professional Responsibilities"* at http://provost.uoregon.edu/content/library.

The assessment should address how accomplishments and performance align with the library's strategic agenda. The statement should conclude with a recommendation for promotion or non-promotion. Before submitting the supervisor statement, the supervisor must discuss the assessment with the candidate, sign the statement, and have the statement signed by the candidate to acknowledge the discussion. The candidate may respond in writing to the supervisor review within ten business days from the date of receipt of the letter and include this

in their documentation.

The supervisor should be mindful that the statement will be reviewed by those unfamiliar with the candidate's work and responsibilities. Acronyms should be spelled out. The *UO Style Guide* (https://communications.uoregon.edu/editorial-style-guide) should be used as the authority for capitalization, proper names, punctuation, and other style and grammar issues.

4.4.5.3. Statement on Subject or Functional Specialist Responsibilities (from AVPUL or other)

For a candidate with subject or functional specialist responsibilities, e.g. collection development responsibilities, the supervisor requests an assessment of performance of these responsibilities from one or more of the following: AVPUL for Research, Instruction, and Access Services, appropriate Collection Fund Manager, academic department liaison, or an academic department faculty. This statement, which may be brief, should be referenced in the supervisor statement.

4.4.6. Documentation Required from Referees

Each referee writes a letter based on review of promotion review file documentation provided by AVPUL-CS and concludes with a recommendation regarding promotion. Although six referees are selected and a minimum of six referee letters are solicited, receipt of all six letters may not be possible in the allotted timeframe, therefore, a minimum of three completed letters is required as part of final documentation for the review; at least one letter should be from a referee not submitted by the candidate seeking promotion (i.e. non-indicated). The completed letters should provide commentary that is representative overall of the three areas under review, as applicable: professional role, Service to the UO Libraries, University, and Community; Research, Scholarship, Creative Activities, and Service to the Profession; and if applicable, professional development.

4.4.7. Documentation Required from AVPUL

The AVPUL writes a letter based on review of the promotion review file of a candidate within their reporting structure, including referee letters and supervisor statement, and concludes with a recommendation regarding promotion. The AVPUL submits the letter to UO Libraries HR and copies the candidate and their supervisor. The candidate may respond in writing to the AVPUL review within ten business days from the date of receipt of the letter and include this in their documentation.

If the AVPUL is the supervisor, the AVPUL letter is not required.

4.4.8. Documentation Required from LFPC

The LFPC writes a letter of review based on its consideration of the candidate's promotion review file, including all reviews in 4.4.5 through 4.4.7. In the letter the LFPC evaluates the candidate's performance in relation to the criteria for promotion and provides a recommendation regarding promotion.

4.4.9. Documentation Required from VPUL

4.4.9.1. Final List of Referees

The final list of referees is determined by the VPUL and may include individuals other than those recommended by the candidate or the supervisor. If referees decline to review or do not respond by the given deadline, the AVPUL-CS notifies the VPUL, who finds alternate referees.

4.4.9.2. Letter of Recommendation Regarding Promotion

The VPUL writes a letter based on review of the candidate's promotion review file and concludes with a recommendation regarding promotion. The VPUL is responsible for evaluating the candidates' file and for evaluating the review process up to that point, including supervisor, AVPUL and LFPC letters, for evidence of compliance with policy and regulation and objectivity, and will consider any special circumstances, policy deviations, and a candidate's history of performance feedback, in formulating a recommendation to the provost. The VPUL shares their letter of recommendation with the candidate and allows the candidate ten business days from the date of receipt of the letter to provide responsive material or information, which shall be included in the evaluation file.

5. Career Continuous Employment Reviews

5.1. Purpose

The primary function of Career Continuous Employment Reviews is to foster continued professional growth and reward excellence. Career Employment Reviews are optional.

5.2. Eligibility

To be eligible for a Career Continuous Employment Review, a faculty member must satisfy the following:

a. Must have a Career appointment as a Senior Librarian; and,

b. Must have an annualized 0.5 FTE or greater; and,

c. Must have accumulated six years of service at 0.5 FTE or greater, as measured from their appointment as Senior Librarian or since their most recent Career Continuous Employment Review.

5.3. Process

To initiate the Career Continuous Employment Review, the eligible bargaining unit faculty member must notify their department or unit head consistent with Section 14 of the CBA.

Career Continuous Employment Reviews will mirror the scope and process for promotion reviews to Senior Librarian status.

If the final 'Review by the Office of the Provost' (Section 20 of the CBA) in a Continuous Employment Review determines that the bargaining unit faculty member's performance in all categories meets or

exceeds expectations, the bargaining unit faculty member will receive an increase to their base salary per Article 26 of the CBA.

6. Contract Renewal (Unrepresented Librarians Only)

Unrepresented Career faculty librarians undergo contract renewal every 2-3 years, depending on their rank. Upon hire, the AVPUL-CS provides written details of contract terms agreed upon with the VPUL's offer to the newly hired unrepresented faculty member.

6.1. Types of Contracts

The VPUL identifies contract conditions when making an offer of appointment to a new faculty member. A contract period ends with the fiscal year and may be less than two years in duration depending on the time of appointment. Upon hire, the AVPUL-CS provides written details of contract terms agreed upon with the VPUL's offer to the newly hired faculty member.

6.1.1. Two-Year Contract

Recent graduates with no or minimal relevant library experience are normally appointed with a two-year contract at the rank of assistant librarian.

Providing satisfactory performance, the two-year contract may be renewed until the individual wishes to apply for promotion to associate librarian. When this promotion is achieved, they will move to a three-year contract. If promotion is denied, the librarian will remain at the assistant librarian rank with a two-year contract and may choose to reapply after having been employed by the university for an additional three years.

6.1.1. Two-Year Contract with Credit

Early career professionals may be appointed with a two-year contract with credit toward an early review for promotion to associate librarian. The initial contract indicates the amount of credit and the date that the individual may be considered for review for promotion to associate librarian. Some determining factors for credit may include length of service at other institutions, rank held in previous appointments, and professional contributions.

6.1.2. Three-Year Contract

Unrepresented Career faculty librarians who have undergone a successful review for promotion to associate librarian receive three-year contracts. Senior administrators such as department heads may be appointed to an initial three-year contract at the senior librarian rank or at the associate librarian rank with possible credit towards early eligibility for promotion to senior librarian.

Individuals hired with an initial appointment of associate librarian do not undergo the review for promotion to associate librarian, as they most likely have experienced a similar review at other institutions. Some determining factors for credit or rank may include length of service at other institutions, rank held in previous appointments, and professional contributions. When

credit for prior service is agreed upon, the terms of hire will state the number of years of credit granted and the earliest date for promotion eligibility. This is negotiated between the candidate upon hire with the VPUL. LFPC will be consulted when a position is eligible for hire at multiple ranks.

6.2. Contract Renewal Criteria

Any librarian candidate for contract renewal is expected:

a. To have demonstrated achievement in their professional role in the UO Libraries, as identified in their position description, and to have contributed to the UO Libraries' strategic agenda. A rubric for evaluation of the professional role is available in Section 3.7.2.

b. To have provided service to the UO Libraries, university, and community. Any community service should relate to professional expertise or position. A full definition of Service to the UO Libraries, University, and Community is available in Section 2.2, and a rubric for evaluating Service to the UO Libraries, University, and Community is available in Section 3.7.4.

c. To have engaged in Research, Scholarship, Creative Activities, and Service to the Profession through activities such as those described in Section 2.3. A rubric for evaluating Research, Scholarship, Creative Activities, and Service to the Profession is available in Section 3.7.3.

6.3. Preparation for Contract Renewal

In non-contract renewal years, the faculty member should meet with their supervisor, consistent with the UO Libraries' annual performance review procedures, to review professional responsibilities and goals to ensure that they align with the UO Libraries' strategic agenda. Such meetings also ensure the individual receives sufficient guidance for future contract renewals and possible candidacy for promotion.

6.4. Documentation Required for Contract Renewal

6.4.1.   Documentation Required from Candidate

6.4.1.1.   Curriculum Vitae
This document must be signed and dated. For examples, see:
https://iris.uoregon.edu/cms/node/4843).

6.4.1.2.   Position Description

If the employee has substantially changed their position within the review period, prior position description(s) should also be included.

This document must be signed and dated.

6.4.1.3.   Candidate Statement

This document must be signed and dated.

The candidate writes a statement of 2-6 pages that describes their accomplishments, their impact, as well as contributions to institutional equity and inclusion. It should address accomplishments since previous contract renewal in the areas of professional role in the UO Libraries; Service to the UO Libraries, University, Community, and/or UAUO; Research, Scholarship, Creative Activities, and Service to the Profession; and if applicable, professional development. If the candidate's position at UO changed substantially during the review period, the candidate should briefly describe those changes and include accomplishments they achieved within each role. For more information on the areas of work performed by Career faculty librarians, and the typical breakdown in percentages, see *"UO Libraries Career Non-Tenure Track Faculty (NTTF) Professional Responsibilities/Workload Policy"* at http://provost.uoregon.edu/content/library. The quality and impact of an individual's accomplishments are most important.

In evaluating the performance of required professional development activities, the review will consider the availability of professional development funds, opportunities for professional development, and the Career faculty member's efforts to secure funding.

The statement should be engaging and understandable to those unfamiliar with the candidate's work and responsibilities. Acronyms should be spelled out. Descriptions of committee service should describe the committee's charge and the candidate's involvement. The **UO Style Guide** (https://communications.uoregon.edu/editorial-style-guide) should be used as the authority for capitalization, proper names, punctuation, and other style and grammar issues.

6.4.1.4.   Evidence of Instruction (if applicable)

A candidate who has taught a credit class, non-credit courses such as workshops, and/or engaged in other pedagogical activity may submit a summary of course evaluations and/or other evidence of instruction resulting from that activity

6.4.1.5.   Statements of Appreciation (optional)

The candidate may submit for the review file letters of appreciation from those with whom he or she has worked in a professional capacity.

6.4.1.6.   Other Material (optional)

Unsolicited statements may be received for the candidate undergoing review and placed in the review file. The AVPUL-CS notifies the candidate when such material is received.

6.4.2.   Documentation Required from Supervisor

6.4.2.1.   Supervisor Statement

The supervisor writes a statement that provides a qualitative assessment of the candidate's accomplishments and performance of all professional responsibilities since previous contract renewal. For more information on the areas of work performed by Career faculty librarians, and the typical breakdown in percentages, see "UO Libraries Career Non-

Tenure Track Faculty (NTTF) Professional Responsibilities/Workload Policy" at http://provost.uoregon.edu/content/library. The assessment should address how accomplishments and performance align with the UO Libraries' strategic agenda. The statement should conclude with a recommendation regarding contract renewal. Before submitting the supervisor statement, the supervisor must discuss the assessment with the candidate and have the statement signed by the candidate to acknowledge this discussion. The candidate may respond in writing to the supervisor review within ten business days from the date of receipt of the letter and include this in their documentation.

The supervisor should be mindful that the statement will be reviewed by those unfamiliar with the candidate's work and responsibilities. Acronyms should be spelled out. The **UO Style Guide** (https://communications.uoregon.edu/editorial-style-guide) should be used as the authority for capitalization, proper names, punctuation, and other style and grammar issues.

6.4.2.2. Statement on Subject or Functional Specialist Responsibilities (from AVPUL or other)

For a candidate with subject or functional specialist responsibilities, e.g. collection development responsibilities, the supervisor requests an assessment of performance of these responsibilities from one or more of the following: AVPUL for Research, Instruction, and Access Services, appropriate Collection Fund Manager, academic department liaison, or an academic department faculty. This statement, which may be brief, should be referenced in the supervisor statement.

6.4.3. Documentation Required from AVPUL

The AVPUL writes a brief letter based on review of the contract renewal review file of a candidate within their reporting structure and concludes with a recommendation regarding contract renewal. The AVPUL submits the letter to UO Libraries HR and copies the candidate and their supervisor. The candidate may respond in writing to the AVPUL review within ten business days from the date of receipt of the letter and include this in their documentation.

If the AVPUL is the supervisor, the AVPUL letter is not required.

6.4.4. Documentation Required from LFPC

The LFPC writes a letter of review based on its consideration of the candidate's review file. The letter may be brief and should focus on the candidate's progress toward promotion, if relevant. The LFPC will make a recommendation regarding renewal upon review of the candidate's file.

6.4.5. Documentation Required from VPUL

The VPUL writes a letter based on review of the candidate's renewal file and concludes with a final decision regarding contract renewal. The VPUL is responsible for evaluating the candidates' file and for evaluating the review process up to that point, including supervisor, AVPUL and LFPC letters, for evidence of compliance with policy and regulation and objectivity, and will consider any special circumstances, policy deviations, and a candidate's history of

performance feedback, in formulating a decision.

6.5. Notice of Non-Renewal

Aligned with the CBA, the University shall provide notice of renewal or non-renewal of an appointment that is not funding contingent no later than May 1st of the last year of the member's current appointment. A Career faculty librarian who receives a notice of non-renewal shall receive a written statement documenting the reasons for non-renewal at the time of notice.

6.5.1.   Grievance Procedures

Unrepresented faculty who receive a notice of non-renewal may choose to pursue a grievance process through Human Resources. Grievance policies and procedures are outlined here: https://policies.uoregon.edu/grievance-procedures

7. Expectation of Continued Employment Ends (Represented Librarians Only)

This is a summary for Career faculty librarians from Articles 16 and 19 of the CBA; please refer to the complete document for exact language.

Career faculty librarians will be hired with the expectation of continued employment, except where specified in the CBA Article 16, Section 18. Their employment may only be terminated for cause (Article 24), through a program reduction or elimination (Article 25), or through layoff (Article 16). Expectations for funding-contingent Career faculty are in Article 16, Section 18.

The employment of a bargaining unit faculty member in the Pro Tem, Visiting, Postdoctoral Scholar, or Acting classifications expires in accordance with its terms and no notice is required.

Career faculty can be laid off from their position at any time with appropriate notice:

- Career faculty in their first year of employment will have a notice period of at least 30 days before being laid off.

- Career faculty in their second and subsequent years of employment but have not achieved promotion to associate or senior librarian, will have a notice period of at least 90 days before being laid off.

- Career faculty who have achieved promotion to associate or senior librarian will have a notice period of at least 365 days before being laid off.

- Funding-contingent Career faculty who have achieved promotion to associate or senior librarian shall receive at least 30 days' notice before being laid off.

- Funding-contingent Career faculty who have not achieved promotion are not subject to notice before being laid off.

The University may lay off a Career faculty member in their first year of employment for any reason.

The University may lay off a Career faculty member in their second and subsequent years of employment for the following reasons:

- Failure to meet the standards of excellence at a major research university, as determined through the procedures developed in accordance with Article 19; or

- Inadequate resources within the UO Libraries to continue funding the bargaining unit faculty member's position; or

- Pedagogical or programmatic reasons, including but not limited to, departmental adjustments necessary to accommodate graduate students

Promotion to associate and senior librarian is elective. An unsuccessful candidate for promotion may continue employment at their current rank as long as eligible to do so under this Agreement. Career faculty who are denied promotion may reapply for promotion after having been employed by the university for an additional three years at an average of 0.5 annualized FTE per year, accrued at no greater than three terms per academic year for bargaining unit faculty on 9-month appointments, and at four terms per year for bargaining unit faculty on 12-month appointments.

8. Peer Institutions

The University of Oregon Libraries has identified the libraries of the following institutions as peer institutions from which candidates and supervisors are encouraged to recommend referees:

8.1. Oregon University System-defined Peers

- [Indiana University](#)

- [Rutgers University – New Brunswick](#)

- [The University of Iowa](#)

- [The University of North Carolina at Chapel Hill](#)

- [University of California, Santa Barbara](#)

- [University of Michigan](#)

- [University of Virginia](#)

- [University of Washington](#)

8.2. Association of American Universities – Public Institutions

- [Georgia Institute of Technology](#)

- [Indiana University](#)

- [Iowa State University](#)

- [Michigan State University](#)

- [Ohio State University](#)

- [Pennsylvania State University](#)

- [Purdue University](#)

- [Rutgers University – New Brunswick](#)

- [State University of New York - Buffalo](#)

- [State University of New York - Stony Brook](#)

- [Texas A&M University](#)

- [University of Arizona](#)

- [University of California, Berkeley](#)

- [University of California, Davis](#)

- [University of California, Irvine](#)

- [University of California, Los Angeles](#)

- [University of California, San Diego](#)

- [University of California, Santa Barbara](#)

- [University of Colorado, Boulder](#)

- [University of Florida](#)

- [University of Illinois, Urbana-Champaign](#)

- [University of Iowa](#)

- [University of Kansas, Lawrence](#)

- [University of Maryland at College Park](#)

- [University of Michigan](#)

- [University of Minnesota, Twin Cities](#)

- [University of Missouri, Columbia](#)

- [University of North Carolina, Chapel Hill](#)

- [University of Pittsburgh](#)

- [University of Texas at Austin](#)

- [University of Utah](#)

- [University of Virginia](#)

- [University of Washington](#)

- [University of Wisconsin, Madison](#)

9. Revision Schedule & History

9.1. Revision Schedule

Revisions shall be undertaken by LFPC every other year and/or as required by changes to the CBA, organization, titles or at the request of LFOA and/or UO Libraries' administration.

9.2. Revision History

Major revisions to this document to incorporate the new performance review procedures, the elimination of contracts for represented librarians, and changes to titles were completed by LFPC 2021-2022: Elizabeth Peterson (co-chair), Katherine Donaldson (co-chair), Danielle Mericle, Damon Campbell, and Franny Gaede; with contributions by LFPC 2022-2023: Elizabeth Peterson (chair), Damon Campbell, Franny Gaede, Kristin Buxton, and Julia Simic. The document was approved by LFOA on September 16, 2022.

Minor revisions to bring the document up to date (links, dates, procedural clarification, gender pronouns, contact information) were accepted by LFOA vote on May 7, 2020, and approved by the Interim Dean on May 11, 2020. These revisions were submitted for final approval by the Office of the Provost on May 12, 2020 and approved by the Office of the Provost on July 13, 2020.

Revisions to 6.4.3 and 8.4.3, accepted by LFOA vote on May 3, 2018, and revisions to 1.2 and 2.2, accepted by LFOA vote on July 26, 2018. These revisions were submitted for final approval by the Office of the Provost on August 3, 2018 and approved by the Office of the Provost on September 19, 2018.

This document was further revised in April, 2015 by the 2014-2015 LFPC (Dean Walton (LFPC Chair) Angus Nesbit, Nathan Georgitis, Karen Munro, and Kelley McGrath) in collaboration with the Dean of Libraries (Adriene Lim), Human Resources Librarian (Laine Stambaugh, and NTTF members of LFOA, to reflect the new *"UO Libraries Career Non-Tenure Track Faculty (NTTF) Professional Responsibilities/Workload Policy,"* adopted with revisions by NTTF members at the LFOA meeting on May 7, 2015, with minor edits by Laine Stambaugh. The May 7, 2015 version of the document was

approved by the office of the Provost and Academic Affairs on August 13, 2016.

This document was revised in July 2014 by Laine Stambaugh (AVPUL-CS) and by the 2014-2015 LFPC (Dean Walton (LFPC Chair) Angus Nesbit, Nathan Georgitis, Karen Munro, and Kelley McGrath) to align with the CBA and other campus practices for NTTF, following ratification of the Collective Bargaining Agreement in October 2013.

This document was previously revised in summer 2011 by an ad-hoc committee appointed by the Dean of Libraries whose members included: Bruce Tabb (chair), Heather Briston, Paul Frantz, Nathan Georgitis, Mary Grenci, and Ed Teague.

Initial revisions were instigated in September 2009 by an ad-hoc committee appointed by the Dean of Libraries, whose members included: Laine Stambaugh, Joni Herbst, Paul Frantz, and Tom Stave.

Further historical documents in relation to these procedures and processes are available in other formats, or see "NTTF Librarians: History and Background" at:
https://iris.uoregon.edu/cms/node/6093.

APPENDIX A

<div align="center">

UNIVERSITY OF OREGON

CAREER FACULTY LIBRARIAN PERFORMANCE REVIEW FORM

</div>

Last Name:	**First Name**:
Department:	**Title**:
Supervisor:	**Rank**:
Evaluation Type (select one): Performance review Merit review	**Evaluation Period**:

Please ensure your narrative for **Professional Role; Research, Scholarship, Creative Activities, and Service to the Profession; Professional Development;** and **Service to the UO Libraries, University of Oregon, and Community** addresses your impact to the UO Libraries, University, and/or the profession, as well as your contributions to the University's goals regarding equity and inclusion.

A rubric for evaluation is available in the document *Promotion, Performance Review, Continued Employment and Contract Renewal Procedures for Library Faculty*, Section 3.7 Evaluation Criteria.

Professional Role

EMPLOYEE NARRATIVE

SUPERVISOR'S EVALUATION/RESPONSE

Professional Role
Exceeds Expectations: Performance frequently exceeds requirements. Consistently performs functions in a timely manner at a high level.
Meets Expectations: Performance consistently meets job requirements.
Does not meet Expectations: Performance frequently does not meet expectations. Improvement is necessary.

Comments

Professional Contributions: Research, Scholarship, Creative Activities, and Service to the Profession

EMPLOYEE NARRATIVE

SUPERVISOR'S EVALUATION/RESPONSE

Research, Scholarship, Creative Activities, and Service to the Profession	
	Exceeds Expectations: Performance frequently exceeds requirements. Performs function consistently in a timely manner at a very high-quality level.
	Meets Expectations: Performance fully meets job requirements on a consistent basis.
	Does not meet Expectations: Performance frequently does not meet expectations. Improvement is necessary.
Comments	

Professional Development

EMPLOYEE NARRATIVE

SUPERVISOR'S EVALUATION/RESPONSE

Professional Development
Exceeds Expectations: Performance frequently exceeds requirements. Performs function consistently in a timely manner at a very high-quality level.
Meets Expectations: Performance fully meets job requirements on a consistent basis.
Does not meet Expectations: Performance frequently does not meet expectations. Improvement is necessary.
Comments

Service to the UO Libraries, University of Oregon, and Community

EMPLOYEE NARRATIVE

SUPERVISOR'S EVALUATION/RESPONSE

Service to the UO Libraries, University of Oregon, and Community
Exceeds Expectations: Performance frequently exceeds requirements. Performs function consistently in a timely manner at a very high-quality level.
Meets Expectations: Performance fully meets job requirements on a consistent basis.
Does not meet Expectations: Performance frequently does not meet expectations. Improvement is necessary.
Comments

Annual Goal Review

Which of last year's goals were accomplished?

Which planned goals were not accomplished and why?

What are goals for this calendar year?

What resources are needed to accomplish the new goals?

POSITION DESCRIPTION ALIGNMENT

Review position description for accuracy and understanding.

The position description accurately reflects the day-to-day duties and responsibilities of the job? (check one) ___YES ___NO

<p align="center">*   *   *   *   *</p>

This Performance Review includes documentation and discussion of the following. Check those that are completed.

     _____ All sections complete with supervisor evaluation

     _____ Review of position description

     _____ Review of previous year's goals

     _____ Set goals for the coming year

     _____ Completion of an employee development plan (as appropriate)

Documents attached:

     _____ Original position description

     _____ Revised position description (as appropriate)

     _____ Current c.v.

____ Supplemental documents such as teaching evaluations, peer evaluations, evidence of impact, kudos, thank you letters

____ Employee development plan (as appropriate)

____ Employee response (as appropriate)

I have reviewed this document with my supervisor. My signature indicates that we have completed these discussions but does not necessarily imply my agreement: any areas of disagreement are noted in my employee response (see attached document). I understand that I am entitled to receive a copy of this form and attachments, bearing all required signatures.

Employee: Date:

_____   _____

Supervisor: Date:

_____   _____

Vice Provost and University Librarian: Date:

_____   _____