

LIBRARY FACULTY POLICY FILE

San Diego State University Library

Revised through July 2024

Table of Contents

Table of Contents 1 Preface 3

I. THE LIBRARY FACULTY	4
I-A THE LIBRARY FACULTY revised 4/7/08	5
I-B COMMITTEES OF THE LIBRARY FACULTY revised 6/09/05	9
I-C. DEAN OF THE LIBRARY APPROVAL OF LIBRARY FACULTY ACTIONS revised 3/16/01	22
II. VACANCY and APPOINTMENT POLICIES AND PROCEDURES	23
II-A VACANCY ANNOUNCEMENTS (effective 7/26/95)	24
II-B APPOINTMENT OF PROBATIONARY TENURE-TRACK LIBRARY FACULTY (revised 6/21/01)	25
II-C APPOINTMENT OF FULL- AND PART-TIME TEMPORARY FACULTY	32
II-D APPOINTMENT AT ANOTHER CAMPUS (revised 10/1/12)	34
III. GRIEVANCES, LEAVES and Assigned Time (Sabbatical and Difference in Pay) (revised 10/1/12) (revised 10/1/12; draft 12/15; Dean reviewed 2/1/2016)	35
III-A FACULTY GRIEVANCE	35
III-B LEAVES, SICK; OF ABSENCE WITH OR WITHOUT PAY	35
III-C SABBATICAL LEAVES	35
III-D DIFFERENCE IN PAY LEAVE	35
IV. GUIDELINES FOR REAPPOINTMENT, TENURE, AND PROMOTION LIBRARY	37
(revised 10/1/12)	37
IV-A CRITERIA AND PROCEDURES FOR REAPPOINTMENT, TENURE, AND PROMOTION OF PROBATIONARY AND TENURED LIBRARY FACULTY (effective 5/10/95) (revised 6/2019)	38
IV-B PROCEDURES AND CRITERIA FOR EVALUATION OF TEMPORARY LIBRARY FACULTY (ASSISTANT LIBRARIAN RANK) (Revised 6/2019)	57
IV-C PROCEDURES AND CRITERIA FOR EVALUATION OF IMPERIAL VALLEY CAMPUS LIBRARY FACULTY	59

Preface

The Library Faculty Policy File is not intended to replace or duplicate either the Collective Bargaining Agreement (CBA) or the San Diego State University Policy File (UPF). It is intended to supplement those resources on matters particular to library faculty. It also includes college/department level policies and procedures mandated by the CBA or UPF. Policies and procedures that merely duplicate either the UPF or the CBA should not be included. Therefore to get the fullest picture of a policy or procedure, librarians are urged to consult the current CBA and UPF for additional guidance.

I. THE LIBRARY FACULTY

I-A Library Faculty

I-B Committees of the Library Faculty

I-C Dean of the Library Approval of Library Faculty Actions

I-A THE LIBRARY FACULTY revised 4/7/08

1.0 Nature, Purpose, and Power (revised 3/6/03)

The Library Faculty shall be a committee of the whole of the library faculty. Its purpose

shall be to assist in the maintenance and promotion of high standards of library service, to foster the professional interests of the members, to afford an opportunity for the systematic expression of professional concerns, and to provide a vehicle for consultative processes on library faculty personnel matters pursuant to Section 3561 of Title I of the California Government Code, Section 42701 of Title V, Article 2, of the California Code of Regulations, the Collective Bargaining Agreement (CBA) between The California Faculty Association and The Board of Trustees of The California State University for Unit 3 – Faculty, and the University Policy File.

The Library Faculty shall have the power to act on all matters within the scope of this purpose when the action is approved by a majority vote of the members present, provided they constitute a quorum, and provided a secret ballot is not specified.

2.0 Membership

Every temporary, probationary, or tenured member of the San Diego State University Library employed in one of the librarian ranks shall be considered a member of the Library Faculty. The Dean of the Library, and other administrative personnel with faculty status who hold retreat rights, shall not be considered members of the Library Faculty while holding administrative status.

3.0 Electorate (revised 4/29/04)

3.1 Voting privileges shall be open to all tenured or probationary library faculty members. Any member of the library faculty may request that the Library Faculty introduce relevant topics for discussion and possible action. Temporary library faculty may vote as permitted by the University Policy File.

3.2 Library faculty members not in residence shall not have voting privileges. Library faculty electing the 10/12 work plan are considered to be in residence for the entire year.

4.0 Officers of the Library Faculty (effective 12/10/85)

4.1 The Library Faculty shall have a Chair, a Vice-Chair, a Secretary, and a Member at Large to be elected annually by the members.

4.11 Annual elections of Library Faculty Officers shall take place after RTP announcements have been made.

4.12 The officers chosen shall assume their duties on June 1.

4.2 Duties of Officers

4.21 The Chair shall preside at all regular and special meetings of the Library Faculty.

4.22 The Vice-Chair shall perform the duties of the Chair in the absence of the latter.

4.23 The Secretary shall keep minutes of all regular, special, and board meetings and an updated list of all Library Faculty members, shall carry on all correspondence on behalf of the Library Faculty, and shall send out all meeting announcements and agendas.

4.24 The Member at Large shall serve as Program Chair.

5.0 Executive Board (effective 12/10/85)

There shall be an Executive Board consisting of the Chair, Vice-Chair, Secretary, Member at Large, and the immediate past Chair.

5.1 Between meetings of the Library Faculty the Executive Board shall be consulted as the representative of the body, and shall take appropriate action on behalf of the Library Faculty. With the exception of specific personnel actions that require consultation with the Library Faculty Personnel Committee, the Executive Board may be consulted on matters that call for peer consultation.

5.2 The Chair shall call and preside at meetings, and be a voting member of the Executive Board.

5.3 The Executive Board shall serve as the Committee on Committees as defined in I-B.

5.4 Any vacancy on the Executive Board shall be filled by the Board, the appointee to hold office until the next annual election meeting of the Library Faculty.

6.0 Meetings (revised 4/29/04)

6.1 There shall be at least three meetings each year. Regular meetings shall be those called at the discretion of the Chair or the Executive Board.

6.11 Written notice of each regular meeting and its agenda shall be distributed to the members in advance of the meeting.

6.12 If at all possible, the Executive Board shall give notice of meeting dates and times further in advance to facilitate members' scheduling.

6.2 Special meetings may be called under these conditions: (a) upon the call of the Dean of the Library, at which time the Dean of the Library or a designee shall preside, or (b) upon the call of the Chair, within two weeks of receiving a written request signed by 10 percent of the electorate for review of action by the Library Faculty.

6.21 Written notice of each special meeting and its agenda shall be distributed to the members at least three days prior to the meeting.

6.3 The meetings are open to all Library Faculty Members. Others may provide information or explain a point of view on matters before the Library Faculty or present a program, by invitation of the Chair or the Executive Board.

6.4 Insofar as possible the Library Faculty shall conduct business only during the academic year when classes are in session.

6.5 A quorum consisting of 50 percent plus one of the voting membership of the Library Faculty shall be requisite for the legal transaction of business at each meeting. Library faculty in the 10/12 work plan are not included in the quorum count if they are not present at the meeting during their months off.

7.0 Agenda (Order of Business) (effective 12/10/85)

7.1 Meeting announcements shall include a proposed agenda prepared by the Executive Board.

7.2 Any member of the Library Faculty may present to the Chair items for the agenda. The Executive Board shall place them on the agenda of the next meeting called or refer them to a specific committee. Disposition of such items shall be indicated in the minutes of the Executive Board.

7.3 During any meeting of the Library Faculty, any member may move that the Library Faculty consider immediately, or at a stated time, any item on that agenda. If the motion is supported by three seconds it shall be put immediately to a vote and, upon a two-thirds majority vote, the item shall be considered out of the agenda order as proposed.

7.4 No action shall be taken on any substantive proposal other than amendments thereto at a meeting of the Library Faculty unless that proposal and supporting information have been circulated in writing to the membership at least four working days prior to that meeting. This rule may be suspended by a two-thirds majority vote of the electorate.

6

8.0 Parliamentary Authority (effective 12/10/85)

All questions of parliamentary procedure not covered by the Policy File shall be decided according to the latest edition of *Robert's Rules of Order*.

9.0 Amendments

Proposed amendments to the Policy File may be initiated by the Executive Board, the Policy File Committee, or by a written request to the Chair signed by 10 percent of the electorate. Copies of proposed amendments must be submitted to the members at least one week before the meeting at which they are discussed.

9.1 Following the discussion meeting, the Executive Board will then direct the Elections Committee to distribute to the electorate a ballot along with notification of any textual changes made at the discussion meeting. An amendment is adopted by an affirmative vote of a majority of those voting.

10.0 Voting Method (effective 4/27/93)

Voice votes or hand votes may be taken at Library Faculty meetings.

For elections and those matters requiring a secret ballot, a ballot will be distributed electronically via any method where all procedural criteria in I-B 3.31 are met. At least a week shall elapse between the distribution of ballots and the deadline for the return of ballots.

12.0 Minutes

Minutes shall be kept of all regular, special, and board meetings and distributed within a few days. Minutes of regular and special meetings shall be distributed to the membership. Summary minutes of Executive Board meetings shall be distributed to the membership. Copies of all official minutes shall also be forwarded to the Library Administration. At the conclusion of each academic year, the Secretary shall make available copies of minutes and agendas from all meetings which occurred that year to the University Archives.

7

I-B COMMITTEES OF THE LIBRARY FACULTY revised 6/09/05

1.0 Appointed and Ex-officio Committees (effective 3/16/01)

For the membership and functions of committees elected by the Library Faculty see the following sections:

- Library Faculty Executive Board (I-B-2)
- Library Faculty Personnel Committee (I-B-7 and IV-A-5)
- Library Faculty Appointment Committees (II-B-2)

- Library Faculty Research and Awards Committee (I-B-6)
- Library Faculty Travel Funding Committee (I-B-7)

2.0 Committee on Committees (effective 12/10/85)

2.1 Membership

The Executive Board shall serve as the Committee on Committees.

2.2 Functions

The Committee on Committees shall have the responsibility during the term of office of the Board for nominating members of standing committees and special committees of the Library Faculty, shall fill vacancies that may occur on these committees, and shall inquire into the activities of these committees to assure itself of the continued usefulness of each committee. It shall consider and, as necessary, revise the list of standing committees and the definition of functions of each committee. Major changes shall be brought before the Library Faculty at a meeting during the Spring semester. The Committee on Committees shall also observe the following:

2.21 During the Spring semester the Committee on Committees shall remind all Library Faculty members of Library Faculty standing committees and invite them to indicate their interest in these or other committee assignments that may become available.

2.22 Standing committee assignments shall be made by the new Executive Board at its first meeting.

2.23 Committees shall consist of at least three members. The members shall select their Chair.

2.24 Administrative officers of the library shall not be named as members of standing committees of the Library Faculty, but may be invited to attend meetings by any committee chair.

3.0 Elections Committee (revised 2/6/2018)

3.1 Membership

A three-member Elections Committee shall be appointed annually by the Executive Board.

3.2 Functions

The Elections Committee shall have the responsibility during the term of office of the Board for conducting all Library Faculty elections including, but not limited to, elections for Executive Board officers and elections for the Personnel Committee.

The Elections Committee shall also nominate a slate of candidates for Library Faculty elective positions. Members of the Library Faculty shall be notified of the nominations at least one week before the election is held. Other nominations may be made in advance of the election by petitions signed by three Library Faculty members and submitted to the Elections Committee.

3.3 Elections Committee Procedures (revised 1/20/2016)

Except as in Section I-B, 3.3143 below, to carry out its functions, all three Committee members must be present.

3.31 Elections not conducted as part of a Library Faculty meeting

Voting by ballot electronic ballots, provided the method is secure, private and ensures that:

- Votes cast are anonymous;
- Only those who are entitled to vote actually vote;
- Members vote only once.

3.312 Ballot-making and distribution

3.3121 At the start of its term the Elections Committee shall obtain from the Office of the Dean of the Library a list (including e-mail addresses where possible) of tenured and non-tenured, permanent and temporary library faculty. The Committee shall be notified by the Office of the Dean of the Library of changes in the list as they take place.

3.3122 The Elections Committee shall prepare and review ballots for Library Faculty elections. Ballots shall be sent via electronic mail.

3.3123 Ballots used to elect Library Faculty committees shall contain the following information: the purpose of the election, the number of members to be elected, the exact deadline for returning ballots (both date and time of day) The ballot should indicate if persons listed have extensive absences (sabbaticals, 10-month year, etc.) scheduled

during the committee's term. Ballots used to elect committee members having staggered terms shall state, “[Name] is continuing on the committee in [year 2 or 3] of a [2 or 3] year term.”

3.3124 Ballots used to vote to approve or disapprove a question shall clearly describe voter options, and contain this statement: "Ballots must be properly filled out. Please vote either YES to approve ... or NO to disapprove"

3.3125 For each step of an election, at least a week shall elapse between distribution of ballots and the deadline for return of ballots except in the most extraordinary circumstances. Exceptions may be made, at the discretion of the Elections Committee, if special circumstances warrant a shorter interval. In no case shall the interval for return of ballots be less than forty eight (48) hours. Voters will be responsible for casting their own ballots prior to the announced voting deadline.

3.313 Ballot counting procedures

3.3131 Counting of ballots may not begin until the deadline for return of ballots has passed.

3.3132 Ballots must be counted within a reasonable length of time following the deadline, and generally no later than the next working day.

3.3133 Once counting has begun, no more ballots will be accepted.

3.3134 Tie votes on a final ballot for election of committees shall be decided by electronic coin toss similar means. On ballots to approve or disapprove an action a tie vote shall be considered disapproval.

3.3135 Election results will be distributed by the Elections Committee Chair to Library Faculty and the Office of the Dean of the Library as soon as possible and not later than five days after the ballots are counted. In the case of

nominating elections two-part elections where people are nominated in one election and chosen from the nominated group in the next election, results will be announced on the information portion of the final ballot.

3.3136 Where applicable, the results will include the names and terms of service, including alternates in ranked order.

3.3137 The Chair of the Elections Committee shall retain custody of all ballots cast during an election. If no formal protest or formal request for election verification is received within one week of announcement of the election results, the ballots will be destroyed. If the results of the election are formally protested or a formal request for election verification is received, the ballots will be retained until the protest is resolved.

3.314 Protests

Erroneous ballots or improper election procedures may be protested orally or in writing by any member of the Library Faculty. Normally, the Elections Committee will resolve protests brought to its attention. Extraordinary situations will be referred to the Library Faculty Executive Board. The decision of the Library Faculty Executive Board shall be final.

3.315 Election Verification

3.3151 Upon receipt of a request within three days of the announcement of election results, endorsed by three or more eligible voters, the Library Faculty Chair will independently verify the result.

3.3152 Results of the verification will be distributed to the Library Faculty by the Elections Committee Chair.

4.0 Policy File Committee

4.1 Membership (revised 8/2019)

A three to four member Policy File Committee shall be appointed annually by the Executive Board. Due to the role of the Policy File in the RTP process, the majority membership of this committee shall be tenured librarians. Faculty members whose tenure will go into effect in fall are eligible to be appointed to the committee on July 1st of the same year and will count toward the total number of tenured committee members needed. The appointees should include at least two continuing members. The chair shall normally be one of the

continuing members.

4.2 Functions

The Policy File Committee shall have the responsibility during the term of office of the Board for ongoing revision of the Policy File.

4.3 The Policy File

4.31 The Library Faculty Policy File is not intended to replace or duplicate either the Collective Bargaining Agreement (CBA) or the San Diego State University Policy File (UPF). It is intended to supplement those resources on matters particular to library faculty. It also includes 13 college/department level policies and procedures mandated by the CBA or UPF. Policies and procedures that merely duplicate either the UPF or the CBA should not be included. Therefore to get the fullest picture of a policy or procedure, librarians are urged to consult the current CBA and UPF for additional guidance (from Preface).

4.32 All permanent policies and procedures adopted by the Library Faculty and approved by the Dean of the Library shall be compiled for inclusion in the Library Faculty Policy File. The first part of the Policy File shall describe the Library Faculty, its committees, and its rules; the remainder shall consist of regulations, guidelines, policies, and procedural matters of concern to the library faculty at large.

4.33 The Executive Board shall ensure the accuracy of the Policy File, and shall advise the Policy File Committee concerning needed revisions, time constraints, etc.

5.0 Academic Planning Committee (effective 3/26/07)

5.1 Membership

A 3-5 member Academic Planning Committee shall be appointed annually by the Executive Board. The appointees should include at least two continuing members. The chair shall normally be one of the continuing members.

5.2 Functions

The Academic Planning Committee shall lead the Library Faculty in planning for and preparing the annual Academic Planning Report, submitted to Library Administration at the end of each spring semester. The Academic Planning Committee shall maintain an ongoing prioritized list of needed Library Faculty positions, based on regular consultations with the Library Faculty; conduct surveys as needed; plan and administer any brainstorming or other group

planning processes throughout the year; compile the results of surveys and planning sessions for review by Library Faculty and Administration; and, review the progress of past and present planning and report to the Library Faculty.

5.3 Timeline

The Academic Planning Committee shall have completed the Academic Planning Report by February 28th in anticipation of the campus call for proposals.

6.0 Research and Awards Committee (effective 2/2016)

6.1 General Charge (revised 2/2016)

14

6.11 The Library Faculty Research & Awards Committee is an elected Library Faculty committee responsible for evaluating:

- Faculty applications for research funds when funding sources require a faculty committee in the evaluation process.
- All significant professional development endeavors performed on assigned time.
- Faculty applications for Sabbatical and Difference in Pay Leaves.

6.12 The Committee shall establish and use a transparent and objective framework for evaluating proposals and communicate the expectations and evaluation criteria to library faculty.

6.121 Whenever possible, the Committee shall publish criteria for evaluating funding proposals (or changes in such criteria) at least 30 days before the proposals are due.

6.2 Composition and Election of the Committee

6.21 Library Faculty members (probationary and tenured) shall elect a Library Faculty Research & Awards Committee composed of three tenured library faculty members. (See University Policy File and Collective Bargaining Agreement 27.5)

6.22 Members will be elected annually in conjunction with the Library Faculty Officers election in mid-May.

6.23 A Chair will be elected annually by the Committee.

6.24 Members of the Committee cannot evaluate applications in an area

identified in 6.11 if they have submitted an application in that area. The Elections Committee will keep an Alternates List and will notify the next alternate to replace the exempted elected member. If the list of alternates is exhausted the Chair of the Library Faculty shall appoint an alternate.

6.3 University Research Grants (revised 3/16/01)

6.31 The Committee shall be the faculty committee evaluating all library faculty applications for university funding of research when the source for such funding requires initial peer review of applications.

6.32 Upon receiving notice of the availability of university funds for research or special projects the Committee shall prepare written evaluation criteria in compliance with criteria specified by the

funding source and have these distributed to all eligible library faculty.

6.33 After reviewing all applications the Committee shall respond in compliance with the methods stipulated by the funding source.

6.4 Assigned time for Research (added 2/16)

6.41 The Committee shall prepare written evaluation criteria based on professional growth to determine the merit of the proposal.

6.42 The Committee shall be responsible for reviewing and updating procedures and criteria to assure that these are in accord with Library and University policy.

6.5 Sabbatical and Difference in Pay Leaves

6.51 The Committee shall evaluate and recommend faculty applications for Sabbatical Leave and Difference in Pay Leaves according to University guidelines and procedures.

7.0 Library Faculty Personnel Committees (revised 4/7/08)

(For evaluation procedures, see IV.)

7.1 Composition of Committees (revised 10/1/12)

7.11 The probationary and tenured library faculty members of the University Library shall elect two peer review committees of tenured full-time library faculty members for the purpose of reviewing and

recommending library faculty members for reappointment, tenure, or promotion. These peer review committees shall be known as the Library Faculty Personnel Committee (General Panel) and the Library Faculty Personnel Committee (Librarian Panel).

- 7.12 In promotion and post-tenure review considerations, Library Faculty Personnel Committee members must have a higher rank/classification.
- 7.13 Library Faculty Personnel Committee members who are either applying for promotion or scheduled for post-tenure review in the current review period are not eligible to serve on a Peer Review Committee and must be replaced.
- 7.14 All tenured faculty are eligible to be elected to serve on Peer Review Committees for all reviews.
- 7.15 All tenured full-time Librarians and Associate Librarians, except those who fall under the provisions of 7.13 above, are eligible to serve on the Library Faculty Personnel Committee (General Panel).
- 7.16 The Library Faculty Personnel Committee (General Panel) shall be composed of four elected library faculty members serving staggered two-year terms. The maximum number of consecutive terms shall be two.
- 7.17 Library Faculty Personnel Committee (Librarian Panel) shall be composed of three tenured full-time library faculty members of Librarian rank serving a one-year term.
- 7.171 The library faculty members elected to the Library Faculty Personnel Committee (Librarian Panel) are also eligible for election to the Library Faculty Personnel Committee (General Panel).
- 7.172 The Library Faculty Personnel Committee (Librarian Panel) will evaluate those library faculty members at, or applying for promotion to, the Librarian rank or undergoing post-tenure review; as well as conduct periodic review of temporary librarians. The Library Faculty Personnel Committee (General Panel) will perform all retention, tenure and promotion reviews for probationary senior assistant and associate tenure-track faculty.
- 7.18 If the pool of eligible Librarians and/or Associate Librarians is

insufficient to fully constitute the required Panels, vacancies shall be filled with outside faculty members elected by the Library Faculty.

7.2 Election Procedures (effective 3/07/03)

7.21 Election of the Library Faculty Personnel Committee, which is composed of two Panels, shall take place annually in conjunction with the Library Faculty Officers election in mid-May. The term of office for this committee shall be September 1 to August 31.

7.211 The names of all full-time Librarians shall appear on the ballot for the Library Faculty Personnel Committee (Librarian Panel).

7.212 The names of all eligible Librarians and Associate Librarians shall appear on the ballot for the Library Faculty Personnel Committee (General Panel).

17

7.22 The ballots shall be distributed to each probationary or tenured Library faculty member.

7.23 Each voter shall mark their preferences for no more than the number of members to be elected.

7.24 Tie votes on the final ballot shall be decided by drawing straws or a similar means.

7.25 Temporary library faculty members are not eligible to participate in these election processes.

7.3 Functions of Library Faculty Personnel Committees

7.31 Review and recommend library faculty members for reappointment, tenure, or promotion.

7.32 Conduct regular reviews of library policies and procedures for reappointment, tenure, or promotion to assure that these are in accord with University policy.

8.0 Mentoring Guidance Committee

8.1 Membership

A three to four-member Mentoring Guidance Committee shall be appointed

annually by the Executive Board from the tenured faculty. At least one member must have the rank of Full librarian.

8.2 Functions

The Mentoring Guidance Committee shall provide guidance and support to the faculty mentors who are leading probationary faculty through the completion of the multi-year Retention, Tenure and Promotion process resulting in their being successfully granted tenure; and shall guide the mentors of tenured faculty through the process of helping their mentees attain Full Librarian status through Promotion.

8.3 Mentoring

8.31 A representative of the Committee shall meet with the new probationary faculty members within two weeks of their joining the library faculty. At this meeting the representative will discuss the pairing of the probationary faculty

member (mentee) with a mentor from the ranks of the tenured library faculty. This Committee also shall make itself available to Associate Librarians who may be seeking Promotion in the future.

8.32 The Committee shall meet with the mentors at least once each semester and discuss the progress made by each probationary faculty member according to the mentoring committee's guidelines

8.33 A member of the committee will communicate regularly with the mentee to ensure the mentoring process is effective.

8.34 An RTP Workshop, sponsored jointly by this Committee and the personnel committees shall be held four months in advance of the first RTP submission deadline for faculty members seeking tenure. The committee will also make themselves available to answer questions regarding the RTP process from both the mentors and mentees.

8.35 The Committee shall be responsible for recommending changes to the content of the Mentoring Policy.

9.0 Ad Hoc Committees

9.1 Ad Hoc or Special Committees (effective 6/9/05)

Ad hoc or special committees may be created when the need arises. The chair and members of these committees may be appointed by the chair of the Library Faculty and/or may volunteer. Members of these committees shall serve until their charge is fulfilled, at which time the chair of the committee shall forward official paper copies of minutes, agendas, and reports from all meetings that occurred during the committee's tenure to the University Archives.

10.0 University Committees (effective 6/2020)

10.1 Appointment to University Senate Committees with a designated librarian seat

In accordance with University Senate Policy File, appointment of the Library representative to university senate committees with a designated seat for a librarian shall be done in the following manner: The Library's representative to the Senate Committee on Committees and Elections (CCE) shall solicit interest from Library Faculty. The library representative on CCE will coordinate with the Library Elections Committee to finalize the ballot and communicate the results to the CCE.

10.2 Library senators are elected according to the University Senate Policy section 4.2 of the bylaws (<https://senate.sdsu.edu/policy-file/bylaws>).

19

11.0 Library Faculty Travel Funding Committee (effective 8/2024)

11.1 Membership

11.1 A Faculty Travel Coordinator shall be appointed to a three year term by the Executive Board. The coordinator shall normally be one of the continuing members.

11.12 The Faculty Travel Coordinator shall be joined by two appointed library faculty members serving staggered two-year terms. Members of the library faculty shall be appointed annually to staggered two-year terms

11.2 Functions

11.21 The Library Faculty Travel Coordinator is responsible for: 1) Advocating for funding and liaising with Library Administration about travel rules and the process; 2) Keeping up-to-date on CSU and campus travel guidelines and restrictions; 3) Maintaining annual travel request and funding spreadsheets used by Library Administration to

manage payments; 4) Maintaining historic travel funding data and providing reports as needed; 5) Mentoring library faculty on the travel process; and 6) Serving as chair of the Faculty Travel Funding Committee.

- 11.22 The Committee shall aspire to use a transparent and equitable framework that has been vetted by the library faculty as a whole for evaluating travel funding requests and communicating the expectations and evaluation criteria to the library faculty.
- 11.23 The Committee shall implement the travel funding process annually to evaluate and rank requests, and determine dollar amounts to allocate.

FACULTY ACTIONS revised 3/16/01

The Dean of the Library must be kept informed of Library Faculty actions. Official minutes of regular, special, or Executive Board meetings are to be delivered to the Library Administrative Office within two weeks of the meeting. Within thirty days of the conclusion of a meeting, the Dean of the Library shall indicate to the Executive Board any exceptions taken to a Library Faculty action; otherwise, after thirty days the action will be considered officially adopted.

It shall be the responsibility of the Chair to ensure that the Dean of the Library is informed promptly, by any suitable means, of Library Faculty actions taken which would require implementation in fewer than thirty days after Library Faculty action, in order that such action not be unduly delayed.

Recommendations or documents of the Library Faculty that require the concurrence or approval of the Dean of the Library must be formally transmitted. The Chair shall send copies for the Dean of the Library along with a transmittal memo. The transmittal memo shall be addressed to the Dean of the Library. The Dean of the Library shall respond to the Chair within thirty days of the date on the memo and indicate approval or needed changes.

II. VACANCY and APPOINTMENT POLICIES AND PROCEDURES

II-A Vacancy Announcements

II-B Appointment of Probationary Tenure-Track Library Faculty

II-C Appointment of Full- and Part-Time Temporary Faculty

II-D Appointment at Another Campus

II-A VACANCY ANNOUNCEMENTS (effective 7/26/95)

1.0 Vacancy announcements of probationary library faculty positions shall be widely disseminated using an inclusive approach that includes emergent outreach channels.

2.0 Announcements of vacant temporary library faculty positions shall be appropriately disseminated either through announcements for the development of applicant pools for potential temporary library faculty positions or vacancy announcements of temporary library faculty positions.

3.0 Library faculty members shall normally develop vacancy announcements. Such announcements shall be subject to approval by Faculty Advancement. Vacancies shall be advertised in accordance with the provisions of II-B, 3.35.

**II-B APPOINTMENT OF PROBATIONARY TENURE-TRACK
LIBRARY FACULTY (revised 6/21/01)**

1.0 Tenure-Track Vacancies (revised 11/15/15)

Tenure-track vacancies are identified and prioritized in the annual Academic Planning Report, prepared by the Library Faculty Academic Planning Committee and in alignment with campus and Library strategic diversity, equity, and inclusion goals

1.1 As soon as possible after approval has been received from the Dean of the Library to fill a position, the elected Library Faculty Appointment Committee and the appropriate Library Administrator shall meet to define the preliminary requirements of the position. The decision of this meeting signifies the library's intention to fill the position expeditiously.

1.11 The master's degree in library and information studies from a library school program accredited by the American Library Association is the appropriate terminal professional degree for academic librarians per the Collective Bargaining Agreement. An applicant must have a master's degree in library science from a library school program accredited by the American Library Association or its equivalent degree by date of appointment.

1.12 "Preliminary requirements" are defined as the general characteristics of the position, such as the primary assignment and a general statement of the subject and skill competencies needed.

2.0 Composition and Election of Library Faculty Appointment Committees (revised 7/13/15)

2.1 Library faculty members shall elect peer review committees of three tenured or probationary full-time library faculty members for the purpose of reviewing and recommending individuals for probationary appointments. Committees should include a campus inclusion representative per campus policy. In addition, these committees may invite a guest from the teaching faculty to participate in the formal interview of candidates. Guests shall have only an advisory function. These review committees shall be known as Library Faculty Appointment Committees.

2.11 Library Faculty Appointment Committees shall be elected for each position to be filled except in those cases where the Library Faculty Executive Board deems it appropriate for a single search committee to fill more than one position.

2.12 Election shall be by ballot distributed to all eligible Library

Faculty members.

2.13 The election shall take place as soon as possible following the decision on

preliminary requirements.

2.14 A minimum of one tenured Library Faculty member must be elected to each Library Faculty Appointment Committee.

2.15 Probationary faculty may only be elected to a Library Faculty Appointment Committee when the appointment is at an equal or lower rank.

2.2 Election Procedures

2.21 The nominating ballot shall list the names of all eligible library faculty. The ballot should specify the Calendar Schedule, preliminary requirements, and indicate if persons listed have extensive absences (sabbaticals, 10-month year, etc.) scheduled during the Committee's term.

2.22 For further election procedures, see the appropriate Election Committee rules.

2.3 If a vacancy occurs on an elected Library Faculty Appointment Committee prior to candidate interviews it shall be filled by the Executive Board from a list of alternates supplied by the Election Committee (see relevant Election Committee rules).

2.4. Committee members must attend a Center for Inclusive Excellence (CIE) implicit bias workshop.

3.0 Library Faculty Appointment Committee Procedures (revised 11/15/15) 3.1

General

3.11 Library Faculty Appointment Committees have the authority to act for the Library Faculty at all stages of the appointment process.

3.12 Library Faculty Appointment Committees shall name one of their members to act as chair.

3.13 Library Faculty Appointment Committees and the Library Administration share responsibility for the search process.

3.2 Position Specifications and Personnel Requisition

3.21 "Position specifications" are defined as the specific characteristics and 25 competencies the successful candidate should possess. Positions must include Building Inclusive Excellence (BIE) criteria. Appointment

committees are encouraged to think equitably and inclusively about the minimum competencies and experiences needed for the position.

3.22 In order to develop preliminary position specifications the Committee shall solicit and receive input from library faculty.

3.23 The Committee shall meet with the appropriate Library Administrator to develop the preliminary position specifications.

3.231 The Committee will circulate these specifications to library faculty and staff for comments. All comments must be received in three (3) working days.

3.24 The Committee and the appropriate Library Administrator shall then meet to amend and finalize the position specifications.

3.241 These specifications shall be made available to any library faculty member who requests them.

3.25 At this point the Committee shall meet to complete the position specifications, position justification, and the proposed rank. This information will be sent to the Dean of the Library for approval.

3.3 Position Advertisement Process

3.31 The Committee shall develop a position advertisement based on the responsibilities and qualifications in the personnel requisition.

3.32 The advertisement shall clearly state what expertise and emphasis is required and include a deadline for first consideration.

3.33 The Committee shall forward the position advertisement to the appropriate Library Administrator for review and approval.

3.34 The Committee chair shall work with the Dean's Office to initiate the advertising process.

3.35 Tenure-track positions shall be advertised in a minimum of two (2) appropriate library, education, and community sources. Committees shall utilize equity-minded and inclusive recruitment strategies. Vacancies shall be advertised locally, regionally, and nationally as appropriate. Such advertisements shall be placed in locations to attract a diverse pool of candidates.

3.36 The Dean's Office shall coordinate essential paperwork and place the requisite advertisements in a timely manner.

3.4 Applicant files are submitted and managed online in Interfolio. (revised 8/25/17)

3.41 Once a search is initiated, Faculty Advancement will set up an Interfolio account for the position and for each member of the Library Faculty Appointment Committee. Committees may take files to their meeting rooms during deliberations.

3.42 Only members of the Library Faculty Appointment Committee, the Library Dean's Office, Faculty Advancement, Employee Relations & Compliance, and the BIE screening committee may access the search in Interfolio.

3.43 Administrators, staff and faculty not involved in the formal recommendation process may review the finalists' cover letters and CVs. The Library Faculty Appointment Committee will send these out before candidates arrive for on-campus interviews.

3.5 Screening of Applications

3.51 The Committee must screen all applications received prior to the established deadline for first consideration. Applications received after the deadline for first consideration may be screened at the committee's discretion.

3.52 All inquiries concerning the position shall be directed to the Library personnel officer or designee. (effective 7/26/95)

3.53 The Committee alone shall do a preliminary screening of applications received and compile listings of applicants who appear to meet our essential requirements and BIE criteria and be eligible for further consideration, and of those not meeting our minimum requirements who will be eliminated from further consideration.

3.54 The Committee alone shall do a second screening of those found eligible for consideration to select the best qualified and compile a list of applicants recommended for interviews. The Committee may also find it advisable to identify a pool of alternates who may be contacted if the top choices are no longer available.

3.55 These listings shall be sent to the appropriate Library Administrator who may at this point choose to meet with the Committee to review the groupings before the Committee finalizes the list. The selected finalists must be certified as meeting a minimum of 2 BIE criteria.

3.56 Notices concerning an applicant's status shall be sent as needed by the Library Budget/Personnel Officer.

3.57 The Committee will develop a letter requesting references. Reference checks may be done via email, phone, or mail.

3.6 Applicant Interviews and Arrangements

3.61 The Committee chair shall work with the Library Administrative Office Coordinator in scheduling applicant interviews and preparing interview schedules.

3.62 Arrangements for each applicant's visit (lodging, travel, reimbursements, etc.) shall be coordinated by the Library Budget/Personnel Officer who will send the candidate a letter describing the details. The Budget/Personnel Officer will also ask candidates about any accommodations needed for the campus visit.

3.63 The Committee shall compile biographical sketches for each applicant.

3.64 The Committee shall distribute the candidate's redacted CV, cover letter, and diversity statement. Candidates shall be notified that these materials have been distributed to library faculty and staff.

3.65 The Committee shall prepare a list of interview questions that shall be asked of each applicant selected for interview.

3.66 The Committee shall fulfill host responsibilities for each applicant selected for interview.

3.7 Consultation Following Appointment Interviews

3.71 Library Faculty Appointment Committees shall take appropriate steps to assure that library faculty and staff have opportunities to communicate with the Committee and shall consider their views in developing its recommendation.

3.711 The Committee chair shall distribute an invitation to all library faculty to comment on the interviewed applicants by a specified deadline. Staff may submit comments following an open forum. Library personnel shall be encouraged to be mindful of their implicit biases. Written comments received shall be included with the Committee's recommendation. Committee members should read feedback through an equity lens to mitigate against biased

comments.

28

3.712 The committee may hold formal and/or informal meetings and discussions with library faculty and staff to solicit their views on the applicants. The chair or a designated Committee member shall summarize in writing the views expressed. The summary shall be appended to the Committee's recommendation. (effective 10/11/91)

3.8 Library Faculty Appointment Committee Recommendations

3.81 Recommendations regarding probationary appointments shall be originated by the Library Faculty Appointment Committee.

3.82 The Library Faculty Appointment Committee has the responsibility to recommend for appointment to full-time positions only those individuals who, by virtue of their qualifications, can be expected to meet reappointment, tenure, and promotion criteria.

3.83 The initial review by the Library Faculty Appointment Committee of an individual being considered for appointment at the Librarian level shall be conducted with extreme care and diligence, taking implicit bias into account and using an equity-minded approach. The Library Faculty Appointment Committee shall not recommend an appointment at the Librarian level unless it can document clear advantage to the University, including inclusive excellence, in hiring this individual at this rank. The criteria used as a basis for this documentation should normally be those used for promotion to Librarian rank, namely, recent evidence of library service effectiveness, professional growth, and service to their previous university, together with evidence of the individual's commitment to a high level of performance in these areas.

3.84 Recommendations and decisions concerning appointment shall be based on:

a. demonstrated potential with respect to professional competence.

b. willingness to accept professional responsibilities related to the development of library service, professional growth, and service to the community.

c. achievement and maintenance of high standards of professional conduct.

(effective 2/25/99)

d. Meeting two Building on Inclusive Excellence (BIE) criteria at minimum and demonstrating a commitment to advancing diversity, equity,

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inclusion

- 3.85 Recommendations shall assess each interviewed candidate's strengths and weaknesses in relation to the advertised requirements and strive to avoid the influence of implicit bias.
- 3.86 In addition to evaluating candidates, recommendations should compare specific candidates.
- 3.87 If the Committee finds that none of the interviewees is appropriately qualified, it will not recommend any of the applicants.
- 3.88 Each Library Faculty Appointment Committee recommendation report shall be approved by a simple majority of the committee members casting a vote. The Committee should make every effort to arrive at a unanimous recommendation.
- 3.881 If, however, the final vote is not unanimous, the vote count should be included in the majority report.
- 3.882 The dissenting Committee member may submit a minority report.
- 3.89 The recommendation report(s) shall be sent to the Dean of the Library.
- 3.891 The names of those recommended shall be reported promptly by the Library Faculty Appointment Committee Chair to all library faculty members, and shall be reconsidered by all full-time tenured library faculty if a majority of full-time tenured library faculty members request such reconsideration within three (3) working days from the date of publication.
- 3.892 The chair shall oversee the timely completion of all forms for which the Committee is responsible.
- 3.893 Except in extraordinary circumstances, recommendations of a Library Faculty Appointment Committee concerning appointment

of probationary library faculty shall be accepted by the Dean of the Library. In cases of those extraordinary circumstances, a written explanation shall be provided to the search committee in a timely manner.

4.0 Library Faculty Appointment Process (revised 10/1/12)

See University Policy File (Probationary Faculty, Appointment of). 31

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II-C APPOINTMENT OF FULL- AND PART-TIME TEMPORARY FACULTY

1.0 Procedures (Refer to Article 12 of the CBA) (effective 4/7/08)

1.1 If the University Library undertakes a search for a temporary position, it must be in full conformity with Nondiscrimination and Equal Opportunity Employment requirements. The University Library, intending to make appointments to temporary Library faculty positions, must undertake annually a search to establish a pool of applicants. This pool may be supplemented by other submitted applications. All temporary appointments must be made from the qualified candidates in this pool. For each appointment, the qualifications of all persons in the pool must be reviewed and the most qualified person available must be appointed.

1.2 Library Faculty will make recommendations regarding the need for any anticipated temporary positions.

2.0 Initial Appointments (Refer to Article 12 of the CBA)

2.1 The Assistant Librarian rank is used for temporary (non-tenure track) library faculty appointments.

2.11 Temporary library faculty members are hired to carry out a specific library service assignment or range of library service assignments. Assignments may be general, they may employ specialized skills, or they may focus on a specific project.

2.12 Basic expectations concerning skills, knowledge, and experience are identified in a personnel requisition that is prepared once the determination has been made to fill a position.

2.2 Entry Requirement: A graduate degree from a library school accredited by the American Library Association or its equivalent is necessary for employment in the Assistant Librarian rank.

2.3 When a temporary librarian position is available, the Library Faculty Executive Board, in consultation with the Dean of the Library, will designate an ad-hoc Library Faculty Appointment Committee of 2-3 librarians. The Appointment Committee will screen and interview applicants from the pool, and make recommendations to the Dean of the Library or designee.

2.4 Except in extraordinary circumstances, recommendations of a Library Faculty Appointment Committee concerning appointment of temporary

library faculty shall be accepted by the Dean of the Library.

2.5 Temporary appointments (both full- and part-time) are not probationary positions. Library faculty do not earn permanence or credit toward tenure no matter how long they serve (refer to CBA).

2.6 All part-time Library faculty members must be appointed on a 40 hour week base. That is, those who perform library service for 10 hours per week are hired for .25 time; those who work for 20 hours are hired for .50 time, and so on.

3.0 Reappointments

See Article 12 of the CBA.

II-D APPOINTMENT AT ANOTHER CAMPUS (revised 10/1/12)

1.0 Appointment at Another Campus

See Faculty section of the University Policy File.

2.0 Appointment of Imperial Valley Campus Library Faculty

See Faculty section of the University Policy File.

III. GRIEVANCES, LEAVES and Assigned Time (Sabbatical and Difference in Pay) (revised 10/1/12) (revised 10/1/12; draft 12/15; Dean reviewed 2/1/2016)

See Preface to Library Faculty Policy File

III-A FACULTY GRIEVANCE

See Faculty section of the University Policy File

III-B LEAVES, SICK; OF ABSENCE WITH OR WITHOUT PAY

See Faculty section of the University Policy File

III-C SABBATICAL LEAVES

See Faculty section of the University Policy File

III-D DIFFERENCE IN PAY LEAVE

See Faculty section of the University Policy File

III-E ASSIGNED TIME

1.0 Assigned Time Funded by Outside Resources

Library faculty may be awarded assigned time funding through outside sources such as grants and contracts or through the University by serving as chairs on university committees or teaching courses.

1.1 Funds awarded through grants and contracts will be administered through the Foundation and will be subject to the contract terms and regulations.

1.2 Funding deposited into the Library's general fund to offset a library faculty member's time will be used to support the librarian, the librarian's department and the Library.

1.3 Due to the nature of their work, it is recognized that some librarians will not have the option of a reduced workload. In lieu of a workload reduction the funds may be used to help support the librarian's department or project.

1.4 Depending upon the terms of the grant or award the funds may be used to assist the librarian in a variety of ways including, but not limited to: hiring temporary library faculty, hiring student assistants, travel or purchasing

equipment. The librarian will negotiate with the Library Administration to determine the best use of the deposited funds to benefit the librarian and the Library.

35

2.0 Assigned Time for Research

Library faculty may request to be relieved from some responsibilities to engage in large

research projects or activities that require more than 20% of the librarian's time.

- 2.1 When funding is available the Library Administration will call for applications for assigned time for research.
- 2.2 All full time tenured and probationary librarians are eligible to apply.
- 2.3 Research assigned time may be requested for up to 119 hours for the fall, spring or summer semester.
- 2.4 Applications for assigned time will be reviewed and ranked by the library faculty Research and Awards Committee using criteria for professional growth to determine the merit of the proposal.
- 2.5 The committee will forward the ranked applications to the Dean who will make the final award decisions. Denials shall specify the reasons.
- 2.6 Any appeals about decisions as related to assigned time for research should be presented as an email message to the Dean detailing the rationale for reconsideration. The appeal should be filed within five working days of the notification of denial. After reviewing the appeal, the Dean will make a final decision on the proposal.
- 2.7 The library faculty member shall provide a final report to the Dean within one semester following the award semester to provide evidence of the completion and impact of the proposed activities. Faculty are eligible for future research assigned time awards only if previous reports have been filed.
- 2.8 Library faculty may apply for assigned time during semesters in which funding is not available. In such circumstances librarians will work with their division and Library Administration to determine feasibility; review by the Research and Awards Committee is not necessary.

3.0 General Principle

- 3.1 Neither Library Administration nor the library faculty member will shift responsibilities to another librarian in such a way that would adversely impact the work of other librarians or staff.

36

IV. GUIDELINES FOR REAPPOINTMENT, TENURE, AND PROMOTION LIBRARY

(revised 10/1/12)

IV-A Criteria and Procedures for Reappointment, Tenure, and Promotion of Probationary and Tenured Library Faculty

IV-B Procedures and Criteria for Evaluation of Temporary Library Faculty (Assistant Librarian Rank)

IV-C Procedures and Criteria for Evaluation of Imperial Valley Campus Library Faculty 37

**IV-A CRITERIA AND PROCEDURES FOR REAPPOINTMENT,
TENURE, AND PROMOTION OF PROBATIONARY AND
TENURED LIBRARY FACULTY (effective 5/10/95) (revised
6/2020)**

The Library at San Diego State University shall be the main intellectual resource that

supports the university's teaching, research, and service. Library faculty shall be committed to excellence in library service, and to professional research, scholarship, and creative activity that complement and strengthen library service. Contribution to the mission of the Library through active participation in service for San Diego State University shall be considered integral to the duties of library faculty.

1.0 General Performance and Achievement Guidelines

- 1.1 Acceptance of professional responsibilities and high standards of professional conduct are expected in all ranks. Standards for promotion to the rank of Librarian are higher than standards for promotion to Associate Librarian. The scope and depth of performance is what distinguishes one library faculty rank from another.
- 1.2 The evaluative criteria of library faculty members for reappointment, tenure, or promotion shall be in agreement with the requirements of the Collective Bargaining Agreement and consistent with the San Diego State University Policy File.
- 1.3 There are three tenure track librarian ranks--Senior Assistant Librarian, Associate Librarian, and Librarian. (See IV-A-3 for Specific Qualifications)
- 1.4 The Assistant Librarian rank is used for temporary (non-tenure track) librarian appointments.
- 1.5 Tenure-track library faculty at SDSU are evaluated on their achievements and contributions in library service; in professional research, scholarship, and creative activities; and in service activities for the University and community. In presenting their work to peer review committees each candidate shall write a narrative summarizing and integrating work in all three areas.
- 1.6 A library faculty member's activities in professional associations, research, other relevant study (e.g., coursework), and professional service, while essential for balanced professional development, must be seen as having a supportive relationship to the primary emphasis on library service effectiveness.
- 1.7 The candidate's entire professional record while at SDSU shall be considered.
 - 1.71 The normal probationary period shall be six years of full-time probationary service. Probationary faculty may request consideration for tenure earlier than the sixth year if the faculty employee believes they have satisfied the criteria for tenure.
 - 1.72 Work developed or sustained while serving at this university shall be

essential to the award of tenure and/or promotion.

1.73 Work as a professional librarian or equivalent position post-MLIS or equivalent degree may be considered. Candidates must demonstrate progressive responsibility for LSE, PG and SER that align with the expectations in the SDSU Library Faculty Policy File. For prior work to be considered in tenure decisions, the work must be at the appropriate professional level.

1.8 Achievements discussed by the candidate shall be supported by appropriate documentation.

2.0 Criteria for Evaluating Performance and Achievement

In order to provide access to information for all clientele, librarians shall be sensitive and responsive to the university's diversity through their library service, scholarship, and research. Probationary and tenured librarians shall be evaluated (a) in achievements and contributions in library service, (b) in research, scholarship, and creative activities, and (c) in service activities for the University and community. In presenting one's work to peer review committees, each candidate shall summarize in accordance with Faculty Advancement guidelines, and when appropriate, integrate, work in all three areas.

2.1 Library Service Effectiveness (70%)

2.11 The primary qualification for reappointment, tenure, or promotion of library faculty is excellence in library service. Library service effectiveness is measured by the expertise demonstrated in assigned areas of responsibility as defined by the RTP guidelines.

2.12 A library faculty member shall be evaluated on such factors as consistency of performance; knowledge of library methods; command of subject area, language, and/or functional responsibilities; judgment, leadership, and creativity; and criteria appropriate to responsibilities. The range of library service activities and the amount of work time allotted to each activity will depend on the nature of the library faculty member's primary assignment(s). In assessing performance, the library faculty member's opportunities to meet library service expectations shall be considered.

2.13 Library service activities shall support the goals of the Library and the University.

2.2 Professional Growth (20%) (revised 8/25/17)

2.21 Continuous growth in librarianship, professional research, scholarship, and/or creative activity is essential. Evidence of this growth includes publications of merit; presentation of professional papers; awards; grants; honors received; and active participation in professional organizations. Research in the field of library science may include the development of theory but more frequently focuses on the reporting of practice.

2.22 Active participation in the governance of professional organizations is recognized as a critical component of professional development. This participation can range from local organizations or chapters (for example, SLA SD or CARL interest groups) up to national/international groups (ALA, SLA, IFLA).

2.23 Evidence of refereed professional growth of merit is required for promotion and tenure. Quality of the evidence may be identified in several ways, and may include: published or unpublished reviews of a candidate's work; external reviews; number of citations for a published work; journal impact factors; acceptance rates; stature of journal or book editorial boards; and/or reputation of journal or publisher in the field. The candidate shall delineate their role/contribution in all scholarly works.

2.231 Refereed Activities: Examples of these activities include, but are not limited to:

- A. An article that undergoes peer-review before acceptance for inclusion in a recognized journal.
- B. A presentation at a professional conference that undergoes a peer-review prior to acceptance.
- C. A book or book chapter that is accepted for publication.
- D. Awarded grants, scholarships, fellowships, awards, etc

2.232 A credential or certification earned through review by an authoritative body (e.g. AHIP, certifications, etc).

2.3 Service to the University and Community (10%)

2.31 Every library faculty member shall assume responsibility for participating in activities that apply the library faculty member's

professional expertise to the benefit of the University and community; department, library, and University committees; student mentoring;

offices in University-associated or relevant community organizations;
library related service for community groups.

2.32 Long term and exemplary service shall have more than the usual bearing on reappointment, tenure, and promotion decisions.

2.33 Involvement in professional organizations is considered professional growth as per section 2.22 above.

2.4 Credit-Bearing Courses (revised 6/2019)

2.41 Teaching credit-bearing courses, such as University Seminar, a subject course, or a for-credit information literacy course, must be seen as having a supportive relationship to the primary emphasis on library service effectiveness or service to the University and community.

2.42 Documentation to support a credit-bearing course shall include a syllabus and a copy of all verbatim student comments.

3.0 Specific Expectations for Reappointment, Tenure, and Promotion

Acceptance of professional responsibilities and high standards of professional conduct are expected in all ranks. The scope and depth of performance is what distinguishes one library faculty rank from another. In order for candidates to be reappointed, they must meet the expectations of their current rank. In order for candidates to be promoted, they must meet the expectations of the rank for which they are seeking promotion. Decisions concerning tenure shall be based on demonstrated performance and acceptance of professional responsibilities.

3.1 Ranks of Library Faculty (revised 3/7/03)

There are three ranks of librarianship for probationary and tenured librarians: Senior Assistant, Associate, and Full Librarian. In order to be reappointed or promoted, candidates must meet the expectations for the appropriate rank.

3.11 Senior Assistant Librarian

Senior Assistant Librarian is the entry level to the probationary and tenured library faculty ranks. Initially Senior Assistant Librarians acquire professional experience, receive opportunities for professional development, and are provided supervision and guidance designed to

give them knowledge, experience, and increasing competence in campus

library activities.

By the end of the second year they are expected to demonstrate knowledge and ability sufficient for independent performance of assigned library service activities, and to give tangible evidence of potential for initiative, judgment, and resourcefulness in carrying out greater responsibilities.

Beyond the first two years library faculty must possess or develop expertise in specific subjects, languages, and/or library functions in support of their library service assignments. The Senior Assistant Librarian must develop a knowledge of library and university goals, policies, and procedures.

To qualify for reappointment and promotion beyond Senior Assistant Librarian, the library faculty member must demonstrate expertise in library service assignments. The professional growth record must also take shape and result in documentable activities and products. Evidence of refereed professional growth is required.

Service to the university and the community will generally involve participation on library unit and library-wide committees and work groups.

The library faculty member must show evidence of functioning at the Associate Librarian level to be recommended for award of tenure and promotion. By the end of their sixth probationary year, library faculty initially appointed to this rank must have been recommended for award of tenure and promoted beyond the Senior Assistant Librarian rank.

3.12 Associate Librarian

Associate Librarian is the rank in which demonstrated skill, knowledge, initiative, innovation, independence, expert judgment, and consistent effectiveness in performing the assigned range of library service activities is expected. In addition to the requirements for Senior Assistant Librarian, Associate Librarians must maintain and, as appropriate, enhance their subject, language, and/or functional expertise, and they must have thorough knowledge of library research methods, of the needs of academic programs, and of procedures and problems of university level public, technical, and/or access services. Associate Librarians may or may not have supervisory responsibility, depending on the nature of their position.

In this rank, meritorious professional growth is expected. Evidence of 42 refereed professional growth is required. Typically, Associate Librarians

contribute to the profession through participation in academic and scholarly activities relevant to librarianship or their subject expertise; leadership roles in and/or active participation in the work of major professional organizations; authoring substantive publications; securing grants; applying and communicating the results of a planned program of study. Service to the university and the community will generally involve participation on library committees, liaison with colleagues on campus or system-wide, or library related service to the community.

To be considered for promotion beyond Associate Librarian, the library faculty member shall normally have served four years in the same rank/classification.

3.13 Librarian

The Librarian rank emphasizes competence, expertise, leadership, scholarship, creativity, reputation in the library community, and overall achievement during one's career at SDSU. In addition to the requirements for Associate Librarian and depending on the nature of the assignment, this rank characteristically involves responsibility for major projects or for ongoing library assignments requiring a high level of professional skill; evaluating, enhancing, or extending services and applying innovations; excellence in overall performance; excellence in management or supervision.

Professional growth contributions may include: ongoing active participation in professional organizations (typically at the state or national level), innovative library contributions or applications, recognition as a resource person in the library and/or the profession, publications of merit in the field of librarianship or one's subject expertise, securing extramural grants or cooperative agreements with other libraries. Service to the university and the community will generally include positions of leadership and responsibility on library, campus, and/or system-wide committees or library related service to the community.

Only tenured library faculty or those selected for simultaneous award of tenure may be promoted to this rank.

3.2 Reappointment

In order for candidates to be reappointed, they must meet the expectations of their current rank (see section above for descriptions of ranks)

3.3 Promotion (revised 10/1/12)

3.31 Promotion to Associate Librarian

To be promoted from the Senior Assistant to Associate Librarian rank, candidates must meet the expectations for an Associate Librarian (see section above for expectations of an Associate Librarian)

3.32 Promotion to Librarian

To be promoted from the Associate to Librarian rank, candidates must meet the expectations for a Librarian (see section above for expectations of a Librarian)

3.33 Eligibility for Promotion (revised 6/2019)

3.331 Probationary library faculty members shall normally be considered for promotion at the same time as they are considered for tenure.

3.332 A probationary library faculty member shall not be promoted beyond the rank of associate librarian.

3.333 Tenured library faculty members shall normally be considered for promotion after they have served four years in the same rank/classification.

3.334 Work completed after the **start** of your last review that was not considered during that review is eligible for consideration in promotion decisions.

3.335 Work completed in the last 5 years may be included as significant accomplishments. However, the curriculum vita is cumulative.

3.336 In some circumstances, a library faculty member may be considered for promotion prior to serving four years in the same rank/classification.

4.0 Types of Evaluation

There are two types of evaluation: Periodic Evaluation and Performance Review.

4.1 Periodic Evaluation (revised 6/2019)

Periodic Evaluations are conducted for Probationary, Post-Tenure, and

44

Temporary faculty according to the timeline specified by the Office of Faculty Advancement. Temporary faculty complete a periodic evaluation every year unless they are on a 3-year contract in which case a periodic evaluation is completed every 3 years. Faculty are notified of their specific requirements by Library Administration.

4.11 A periodic evaluation of a library faculty member shall normally be required for the following purposes:

4.111 Evaluation of tenured library faculty members who have not been reviewed for promotion during the past five years. (See IV-A, 4.14 .

4.112 Evaluation of probationary library faculty members not subject to a performance review. (For performance review, see IV-A, 4.2).

4.113 Evaluation of temporary library faculty members. (See IV-B).

4.114 Periodic evaluations shall be conducted by a Peer Review Committee and the Dean of the Library or designee.

4.12 Documentation Requirements (effective 11/91 and 2/28/95 – sections combined) (revised 6/2019)

4.121 The library faculty member to be evaluated must submit a Periodic Evaluation in accordance with Faculty Advancement.

4.122 The library faculty member being evaluated shall succinctly summarize on the Periodic Evaluation Form activities and accomplishments in each of the required evaluation criteria categories. Summaries shall provide sufficient information and detail to enable the Peer Review Committee to evaluate the candidate relative to the qualifications for that rank.

4.123 For post-tenure review, only the last five (5) years will be covered. For probationary library faculty, the period since the initial appointment shall be covered. For temporary library faculty, the period since the last evaluation or, if none has been done, since the initial appointment shall be covered.

4.124 The completed Periodic Evaluation Form shall conform to the

requirements on the Office of Faculty Advancement website for each library faculty rank.

45

4.125 Peer evaluations shall address the effectiveness of the library faculty member's performance during the review period.

4.126 Peer evaluations shall be addressed to the Library Faculty Personnel Committee. Evaluations may either be given directly to the library faculty member or sent to the Library Faculty Personnel Committee.

4.127 Supplementary or one-of-a-kind file material shall not be included.

4.13 Periodic Evaluation of Probationary Tenure-Track Library Faculty (effective 6/1/00)

4.131 Periodic Evaluation Cycle

Probationary library faculty are subject to a Periodic Evaluation rather than a Performance Review in years 2, 4, and 5 of their tenure track appointment. The periodic evaluation provides an opportunity to evaluate the strengths and weaknesses of a candidate without having to make a personnel recommendation.

4.132 Scheduling of Periodic Evaluations

4.1321 Periodic evaluations shall be done for all probationary library faculty members who initially receive a three-year appointment.

4.1322 The evaluations will generally be conducted according to the timeline established by Faculty Advancement.

4.1323 As soon as possible after the Fall semester deadline for submittal of the Working Personnel Action File (WPAF) has passed, and no later than the timeline established by Faculty Advancement, the Office of the Dean of the Library and the Peer Review Committee shall jointly announce the names of probationary library faculty members scheduled for periodic evaluation in the current academic year, issue a timetable for the review cycle, and send

individual notifications to library faculty members scheduled for review.

46

4.1324 The timetable must include deadlines for submittal of the periodic evaluation form, information from faculty and others, the Peer Review Committee's evaluation, and the evaluation by the Dean of the Library or designee.

4.14 Periodic Evaluation of Tenured Library Faculty (Post-tenure Review) (effective 5/18/98)

4.141 Post-tenure Review Cycle

To maintain and improve the effectiveness of their performance, tenured library faculty members shall be subject to periodic evaluation at intervals of no greater than five years.

4.142 Scheduling of Post-Tenure Reviews (effective 6/1/00)

4.1421 Regular performance evaluations shall be done for eligible tenured library faculty members once every five years. In extraordinary circumstances, performance evaluations may be done more frequently.

4.1422 The evaluations will generally be conducted during the Spring semester.

4.1423 The Office of the Dean of the Library shall maintain, and supply when needed to the Peer Review Committee, up-to-date lists of all tenured library faculty members. The lists shall be arranged in chronological order by the date of the last performance review or periodic evaluation, and by tenure date.

4.1424 The Office of the Dean of the Library shall also make the lists available to any library faculty member who submits a written request to see them.

4.1425 Library faculty participating in pre-retirement reductions in time base will be included in the review schedule.

4.1426 As soon as possible after the Fall semester deadline for submittal of the Working Personnel Action File (WPAF) has passed, and no later than the timeline established by the Faculty Advancement, the Office of

47

the Dean of the Library and the Peer Review Committee shall jointly announce the names of library faculty members scheduled for post-tenure review in the current academic year, issue a timetable for the review cycle, and send individual notifications to library faculty members scheduled for review.

4.1427 The timetable must include deadlines for submittal of the periodic evaluation form, information from faculty and others, the Peer Review Committee's evaluation, the evaluation by the Dean of the Library or designee, and the meetings to discuss the evaluation.

4.15 Periodic Evaluation of Temporary Library Faculty See section:IV-B.

4.2 Performance Review for Tenure and/or Promotion (effective 10/11/91)

A Performance Review is completed for probationary faculty during the tenure process in years 3 and 6. Faculty may choose to complete a performance review in any year they wish to seek tenure and/or promotion. Faculty are notified of their specific requirements by Library Administration. This entails completion of a Working Personnel Action File (WPAF) document by the library faculty member, and performance evaluation by the Peer Review Committee resulting in a recommendation.

The WPAF, which includes the Personnel Data Summary (PDS) and the write-ups and evidence (formerly the One-of-a-kind (OAK) file), is the file specifically assembled for use in a given performance review evaluation cycle. That file shall include all required forms and documents, all information specifically provided by the library faculty member being evaluated, and information provided by faculty, students, and academic administrators, when appropriate. It shall also include all library faculty and administrative level evaluations/recommendations from the current cycle, and all rebuttal statements and responses submitted.

4.22 Performance Review Cycle (revised 8/25/17)

A Performance Review for a library faculty member shall normally be required for the following purposes:

- a. Reappointment of a probationary library faculty member (for procedures, see Section IV-A, 3.3);
- b. Award of tenure (for procedures, see Section IV-A, 3.3);

48

c. Promotion (for procedures, see Section IV-A, 3.4); and d. Post-tenure evaluation.

4.23 Documentation

For any evaluation cycle, information may be submitted directly to the review committee by faculty, students (including teaching evaluations), academic administrators, and the President. This evaluative feedback may be submitted prior to the closing date of the WPAF. Guidelines are included in section 4.235.

4.231 Formal Peer Evaluation Submitted to the Review Committee

For reviews of library faculty the candidate will solicit formal written evaluations from two tenured library faculty colleagues containing their association with the candidate, an evaluation of the candidate's work at their current rank, comments regarding the candidate's strengths with specific examples and additional comments about areas of improvement with specific examples. The template for this feedback is found on the Faculty Advancement website.

4.232 Candidate's Responsibilities for Communication and Documentation

Critical peer evaluation is essential and an indicator of one's acceptance of professional responsibility. It is the candidate's responsibility to make their colleagues aware of their professional activities.

4.233 Documentation Beyond the Formal Peer Evaluation

The individual who is subject to, or requesting, a performance review is responsible for preparing a Personnel Data Summary and assembling the requisite supporting information. (For specifics see the Faculty Advancement website).

Supporting information will normally include evaluative letters from library peers and/or assessments by students, faculty, peers in other libraries, and other appropriate persons who have had adequate opportunity to evaluate aspects of the candidate's performance.

Professional contributions, creative activities, etc., should be documented by inclusion of programs, papers, letters, official communications, etc., that give an indication of one's role.

49

Scholarship or research that results in publications, presentations, or similar productions shall be documented by inclusion of copies of the work. Publishers' letters of acceptance, and reviews or evaluations of these productions, should also be included.

Other activities should be documented by letters of appointment, documents prepared, indication of offices held, etc.

4.234 Peer Responsibilities for Communication and Documentation

4.2341 Feedback following an activity

Faculty colleagues are encouraged to take an interest in the activities of colleagues and provide written feedback on presentations, lectures, publications, reports, etc., at the time of the event.

4.235 Guidelines for Evaluative Feedback

4.2351 Evaluation letters should be balanced, candid, and concise. Letters should also be as specific and as detailed as possible about the candidate's performance and include reasonable suggestions for improvement in weak areas. Evaluators should both supply the evaluative information and explicitly identify the basis for the conclusions reached.

4.2352 Evaluators must assess the value of the candidate's contribution(s). Evaluation of any activity or contribution must be qualitative, not merely enumerative, and should indicate how the contribution compares with the activity and quality appropriate to

the library faculty member's rank and responsibilities.

4.2353 Evaluation of library service effectiveness is based on first hand observation or knowledge of aspects of the reviewee's performance.

4.2354 Evaluation of professional growth activity, based on the peer reviewer's knowledge of the professional growth arena or specific activity, is expected. In evaluating

50

participation in organizations or external publications, comment on both the contribution itself and the sponsoring organization, journal, etc.

4.2355 Evaluation of service for the university or the community, based on the peer reviewer's knowledge of the reviewee's participation and contributions, is also recommended.

5.0 Procedures for Peer Review Evaluations (revised 10/1/12)

5.1 General Responsibilities and Obligations of Faculty Peer Review (revised 10/1/12)

5.11 Recommendations and decisions concerning reappointment and tenure shall be based on demonstrated performance and acceptance of professional responsibilities. The responsibilities of Library faculty members include effectiveness of library service, professional growth, and service to the academic community.

5.12 The Library faculty has an obligation to use the probationary period for careful and objective evaluation of new Library faculty. Each probationary Library faculty member shall be evaluated at least annually, in accordance with established criteria.

5.13 Review by library faculty personnel review committees shall be based on documentation submitted for that particular review and shall be consistent with guidelines and forms incorporated in the Library Faculty Policy File.

5.14 The library faculty member's performance in library service, professional growth, and service to the university and community shall be evaluated in relation to the expectations for that rank. Strengths and

weaknesses shall be noted.

5.141 Evaluation of a temporary library faculty member subject to periodic evaluation shall be based on library service. If evidence of professional growth or service to the university and community are included on the individual's Periodic Evaluation Form or in the information submitted, this evidence shall also be considered.

5.15 Members of a committee involved with personnel evaluations will regard all documents brought before the committee, all deliberations, and all recommendations as confidential, except as disclosure is permitted or required by the Library Faculty or University policy files or by law.

51

5.16 Current evaluation criteria and procedures shall be made available to the library faculty member and to the evaluation committee and library administrators prior to the commencement of the evaluation process.

5.17 According to the University Senate Policy section 2.5, evaluation criteria and procedures shall be made available to the faculty member no later than 14 days after the first day of instruction of the academic term and to the evaluation committee and the academic administrators before the formal evaluation begins. Once the evaluation has begun, there shall be no changes in evaluation criteria or procedures.

5.2 General Procedures and Timeline (revised 6/2019)

5.21 The list of library faculty members to be considered for reappointment, tenure and/or promotion shall be distributed to each library faculty member on the list each year by the Office of the Dean of Library.

5.22 The Office of the Dean of the Library will email notices of timelines for the reappointment, promotion, and tenure process to the Library Faculty Personnel Committee and librarians being reviewed when notified of timeline by the Office of Faculty Advancement.

5.221 It is the responsibility of the library faculty member who is eligible for reappointment, tenure and/or promotion to submit a current WPAF to the library peer review committee by the date established by the Office of Faculty Advancement.

5.222 General and Librarian Panel letters will be due on the date provided by Faculty Advancement for colleges.

5.223 Response/Rebuttal periods will follow the timeline of

Faculty Advancement according to the RTP Procedures section 4.1.5 of the University Senate Policy.

5.23 The Office of the Dean of the Library and the library peer review committee shall be responsible for identifying and providing materials relating to evaluation not provided by the faculty member.

5.231 A tenured library faculty member who satisfies the eligibility criteria will automatically be considered for promotion unless they request in writing to the Office of the Dean of the Library that they not be considered.

52

5.232 All other tenured library faculty members eligible for promotion consideration must request in writing that consideration to the Office of the Dean of Library.

5.3 Library Faculty Peer Review Committee General Procedures (revised 10/1/12)

5.31 Library peer review committees shall establish and operate under written procedures ratified by the electorate of the college eligible to vote in Senate elections.

5.32 Recommendations shall be based on activities and contributions documented in a candidate's working personnel action file.

5.33 The first meeting of the Library Faculty Personnel Committees shall be convened by the Office of the Dean of the Library. At that meeting, each committee shall elect a chair.

5.331 The chair(s) of the Library Faculty Personnel Committee(s) shall be responsible for convening meetings, coordinating the committee's work, coordinating the validation of the candidates' PDS, and for communicating and consulting with other authorities within the Library.

5.34 No official meeting may be conducted with fewer than three members present.

5.341 For official meetings that involve personnel deliberations, a full committee is required.

5.35 Alternates may be required in the following cases: resignation, extended

absence or disability, or disqualification of a committee member. Disqualifications occur primarily in situations that suggest a potential conflict of interest. Alternates may be accepted in other circumstances committees determine to be appropriate.

5.36 Once deliberations have begun on a particular candidate, alternates will not be appointed to committees except under extraordinary circumstances (e.g., disability or lengthy or unavoidable absence of an original committee member). In such instances deliberations must begin over again when the alternate joins the committee.

5.37 Library faculty personnel committees may seek advice on procedures or other matters relating to committee functions from the Library Faculty Chair who will be responsible for consulting with other authorities such as library or university administrators, or university-wide committees.

53

5.38 Each Library Faculty personnel committee evaluation report and recommendation shall be approved by a simple majority of that committee casting a vote.

5.39 Committee recommendations shall be forwarded to the Office of the Dean of the Library, and candidates shall be notified of library faculty personnel committee evaluations and recommendations via the Office of the Dean of the Library.

5.4 Library Faculty Peer Review Committee: Validation of WPAF

5.41 It is the responsibility of candidates to submit WPAFs to departments/schools by the published deadline and to provide all support materials necessary for validation.

5.42 Committees shall carefully examine each candidate's supporting documentation to ensure that candidates have forwarded all of the necessary materials. Adequate time should be provided for the review of these materials. The committee may request, via the Office of the Dean of the Library, that pertinent materials be added to the files.

5.43 The Peer Review Committee will validate candidate files according to the Faculty Advancement checklist annually. In years where the candidate requests tenure and/or promotion, the Peer Review Committee will also validate the accuracy of the candidate's PG.

5.44 If the Peer Review Committee finds the documentation unclear or incomplete, the Committee may meet with the library faculty member to obtain the needed information.

5.5 Candidate Review Letters

5.51 The chair or another Committee member chosen prior to the start of deliberations shall write up a draft of the Committee's evaluation and distribute it to Committee members for review. The Committee shall schedule a meeting for the purpose of finalizing the evaluation. The chair of the Peer Review Committee will retain a copy of this document during this review cycle, and copies will be sent to the Dean of the Library or their designee and to the library faculty member.

5.52 Each peer review committee evaluation report and recommendations shall be approved by a simple majority of the membership of that committee.

54

5.53 The Library Faculty Personnel Committee's recommendation, which shall appear in the PDS, shall present its written evaluation. An abstention shall count as a negative vote. The Library Faculty Personnel Committee shall present its written evaluation and recommendation to the candidate and to the Dean of the Library in accordance with the University reappointment and tenure time schedule.

5.54 At all levels of review, before recommendations are forwarded to a subsequent review level, library faculty members shall be given a copy of the recommendation and the written reasons therefore. The library faculty member may submit a rebuttal statement or response in writing or request a meeting be held to discuss the recommendation within ten weekdays, excluding holidays, following receipt of the recommendation. A copy of the response or rebuttal statement shall accompany the PDS and also be sent to all previous levels of review. This section shall not require that evaluation be extended.

5.55 In accordance with provided timeline, the Dean of the Library shall submit an independent recommendation regarding library faculty members eligible for promotion. The Dean shall not rank order the recommended library faculty.

5.6 Library Faculty Peer Review Committee: Informal Mentoring

5.61 A library faculty personnel review committee may convey advice or information to the individual for this or future reviews. Such counsel will normally address application of the evaluation criteria, organization of documents, or needed supporting evidence.

5.62 When a library faculty personnel committee has information to convey to the individual being reviewed that will not be made part of the formal evaluation report (e.g., advice on ways to meet the evaluation criteria for future reviews, suggestions on organization of the working personnel action file, examples of supporting evidence that could strengthen the file, etc.), this should be conveyed to the individual informally.

5.7 Personnel Action File (revised 6/1/01)

5.71 For periodic evaluation of probationary, temporary, or tenured library faculty members, copies of this evaluation and the separate evaluation prepared by the Dean of the Library or their designee shall be placed in the library faculty member's Personnel Action File.

5.72 For periodic evaluation of tenured library faculty, the chair of the Peer Review Committee, the Dean of the Library or their designee,

55

and the library faculty member shall meet to discuss strengths and weaknesses and to suggest any improvement.

5.721 Following this meeting the Dean of Library or their designee shall send an evaluation letter to the library faculty member's Personnel Action File, with a copy to the individual.

5.73 The library faculty member may submit comments or a rebuttal statement to be filed in the Personnel Action File, and may also request a meeting with the Peer Review Committee, the Peer Review Committee chair, or the Dean of the Library or their designee to discuss the evaluations or the summary evaluations.

**IV-B PROCEDURES AND CRITERIA FOR EVALUATION OF
TEMPORARY LIBRARY FACULTY (ASSISTANT
LIBRARIAN RANK) (Revised 6/2019)**

1.0 Procedures (effective 6/1/00)

1.1 Evaluation Cycle

Temporary faculty are evaluated regularly to support library service effectiveness and to provide information for appointment and work assignment decisions.

Temporary faculty members on a 1-year contract must undergo an annual periodic evaluation.

Temporary faculty members requesting an initial 3-year contract must undergo a cumulative periodic evaluation, after an entire 6-year period has been worked on a single campus in a single department to become eligible.

Temporary faculty members requesting a subsequent 3-year contract must undergo a cumulative periodic evaluation of the entire 3-year appointment, prior to reappointment.

Full-time or part-time temporary library faculty members appointed for a period that is less than one year in length shall be evaluated at the discretion of the Dean of the Library or a designee. The employee may request an evaluation.

1.2 Scheduling of Periodic Evaluations

1.21 The evaluations will generally be conducted according to the timeline established by Faculty Advancement.

1.22 The Office of the Dean of the Library shall provide the names of temporary library faculty subject to review to the appropriate faculty committee. Review shall be conducted by a committee of tenured faculty members (minimum of 3 persons) and by the individual's assigned administrator.

1.23 The Office of the Dean of the Library shall announce the names of temporary library faculty members scheduled for periodic or special evaluation, shall communicate the timetable for the review cycle, and shall send individual notifications, evaluation criteria and procedures to temporary library faculty members scheduled for review in a timely manner.

1.24 A copy of the evaluation shall be provided to the temporary faculty member and filed in the official Personnel Action File (PAF) in the Office of the Dean of the Library.

1.25 Evaluation information, timetables and forms are available on the Faculty Advancement website.

2.0 Criteria for Evaluation (effective 5/10/95)

- 2.1 Evaluation of a temporary library faculty member subject to periodic evaluation shall be based on library service effectiveness. The evaluation shall rate the temporary faculty member as either satisfactory or unsatisfactory in accordance with the Collective Bargaining Agreement.
- 2.11 Temporary library faculty members' performance in their specific library service assignments shall be evaluated on the same factors as tenure track/tenured library faculty. (See IV-A, 2.1 for Library Service Effectiveness evaluation criteria.)
- 2.12 Professional growth and/or service for the university and the community are not normally expected of temporary library faculty. If evidence of professional growth or service for the university and the community are included on the individual's Periodic Evaluation Form or in the information submitted, evaluation of these categories is at the discretion of the Committee.

3.0 Documentation for Periodic Evaluation (effective 11/91, revised 6/2019)

- 3.1 For periodic evaluation, the temporary library faculty member being evaluated shall succinctly summarize activities and accomplishments falling within the Library Service Effectiveness category. Summaries shall provide sufficient information and detail to enable the Committee to evaluate the candidate relative to the qualifications for that rank.
- 3.2 Evaluative feedback from the library faculty member responsible for the area(s) in which the candidate works are required. Additional supporting documentation guidelines are available from Faculty Advancement.
- 3.3 The period since the last evaluation or, if none has been done, since the initial appointment shall be covered.

IV-C PROCEDURES AND CRITERIA FOR EVALUATION OF IMPERIAL VALLEY CAMPUS LIBRARY FACULTY

See Faculty section of the University Policy File.

