1. Introduction

Academic Performance Review and Development is a collaborative process requiring the active involvement of both the librarian and the Head. Together, they will work to establish clear goals and objectives, review results achieved compared to the planned goals and objectives, and discuss any actions necessary to enhance the librarian’s ability to achieve his/her goals and objectives. While the results of this process will acknowledge the past and capture the overall contribution the individual has made to the library during the period identified, greater emphasis will be placed on the future, the goals and objectives for the coming year, and the commitment of the Head to support and facilitate, where possible, the achievement of these goals and objectives.

2. Goals

As stated in UMFA Article 35.1, Performance Evaluation, performance evaluation is intended primarily for formative purposes. As such, the goals of the performance review and development process are as follows:

2.1 To assist librarians in performing their duties more effectively by providing librarians with a measure of their performance in their professional roles and constructive feedback for improving performance and developing professionally.

2.2 To promote librarian renewal and development in all aspects of professional life.

2.3 To foster a climate of trust through fair treatment, due process, and participatory interaction of the individual librarians with the Libraries.

3. Assumptions

3.1 A critical link exists between performance, development and institutional mission, goals, and policies, a linkage that can only be maintained if these are explicit, understood, and accepted by both the Director of Libraries (Director) and librarians.

3.2 Individuals are motivated by the search for meaning in their work and the desire to control their work environments.

1In the context of this document the term Head shall mean Director, Associate Director, Coordinator, Head, or Section Head.
3.3 Individuals exhibit a wide range of talents, attitudes, and interests, including values, career backgrounds, stages of career development, personal circumstances, and outside-of-work activities.

3.4 The performance review and development process should strengthen performance in a manner that will benefit the Libraries and will contribute to successful promotion decisions for individual librarians.

4. Principles

The performance review and development process will:

4.1 encourage librarians to recognize the need for renewal through participation in development activities that serve both their professional and program planning needs and those of the institution;

4.2 focus on individual growth, change, and renewal over the long term;

4.3 advocate a system that takes maximum advantage of individual librarian’s strengths, interests, competence, assigned duties, and career stage;

4.4 recognize that the individual librarian’s contribution to teaching, research, and service may vary, depending on rank and responsibilities;

4.4 respond to changing requirements and conditions within the Libraries and the University.

5. Procedure

5.1 Continuing Appointments

Following the successful completion of the probationary period, the librarian and Head will undertake the Academic Performance Review and Development process on an annual basis. The academic year will guide the scheduling of this process (e.g. April to August will be the usual period during which the process takes place). The Director’s Office will have the responsibility of maintaining the schedule and notifying the Head of the need to begin the Academic Performance Review and Development process.

5.2 The librarian and Head will agree on a schedule for the review process.

5.3 The librarian will have at least one month to prepare a self-evaluation report by completing the UML Performance Review and Development for Librarians form describing accomplishments during the past year, outlining goals for the coming year, and then forwarding the completed form to the Head. Reference should be made to the librarian’s current job description and Libraries’ Professional Evaluation Criteria (see 6.1).
5.4 Within one month of receiving the completed form, the Head will prepare his/her written review of the librarian’s performance over the past year with reference to the goals identified previously. The Head will also make reference to the librarian’s current job description and Libraries’ Professional Evaluation Criteria (see 6.1).

5.5 The librarian and Head will meet to discuss the librarian’s academic performance and development, the self-evaluation report, the job description, and the agreed upon goals for the coming year.

5.6 The Head will write a summary of the discussion and amend the job description (if necessary). The librarian will have the opportunity to respond to the summary comments. Both the Head and librarian will sign the documents which will then be forwarded to the Director.

6. Evaluation Criteria

The evaluation will be based on a librarian’s professional performance; research, scholarly activity and creative works; professional service; and professional development.

6.1 - Professional Performance ²

6.1.1 Knowledge: Exhibits professional competence, thorough knowledge and expertise in an area of library service.

6.1.2 Quality of Work: Works diligently. Accomplishes work fully and in a timely effective manner. Results are dependable and contribute to the Libraries. Focuses on the improvement of quality of work or service.


6.1.4 Cooperation: Shows tacts, courtesy, good humour and respect. Supports and encourages interactions and calculated risks. Considers others’ ideas. Is willing to pursue goals by alternate means. Accepts direction and constructive criticism.

6.1.5 Initiative: Shows creativity and resourcefulness in problem solving, job responsibilities, and in committee participation.

6.1.6 Professional Responsibility: Accepts responsibility for actions, decisions and in assigned areas of operation. Respects organizational relationships and policies, colleagues’ areas of expertise, knowledge and area of operation. Maintains standards of professional conduct.

²The Evaluation Criteria were partially derived from the UVic Libraries Evaluation Policy for Librarians - Feb.8, 2002.
6.1.7 **Communication:** Demonstrates communication skills by using methods and tools appropriately. Reports clearly and concisely. Provides positive feedback and evaluation to staff. Encourages open dialogue.

6.1.8 **Leadership and/or Administrative Abilities:** Ensures that work is done properly through effective planning and organization. Motivates others to attain high standards. Sets example that inspires confidence and trust of staff and colleagues.

6.1.9 **Teaching:** Involves competence and effectiveness in teaching students, either individually or in groups, faculty members, colleagues and other users of the library, and may include the development of non-credit and credit courses and instruction tools.

6.2 **Research, Scholarly Activity and Creative Works**

Engages in research in an academic subject, archival studies or librarianship. Research includes “action research”\(^3\) that would contribute to the profession or discipline. Completes an advanced degree and/or relevant educational programs. Participates in the planning, implementation of and/or, gives presentations at, workshops or conferences.

6.3 **Professional Service**

Participates on library, faculty, and university committees as a member or in a leadership role. Active in service to the profession or discipline, for example, participation on committees or membership on the executive of professional associations. Contributes professional expertise to the greater community.

6.4 **Professional Development**

Attends and participates in conferences, courses and workshops related to academic or professional development. Maintains an active membership in professional associations. Demonstrates a knowledge of current issues in the discipline.

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\(^3\) Action research has been defined as “research that aims to contribute both to the practical concerns of people in an immediate problematic situation and to the goals of social science by joint collaboration within a mutually acceptable ethical framework. It must possess an aspect of direct involvement in organizational change, and simultaneously it must provide an increase in knowledge” P.C. Clark. *Action Research and Organizational Change.* Harper, 1972.