

ARTICLE 21: PERFORMANCE REVIEWS FOR LIBRARIANS

21.01 21.01.01 Reviews of a member's performance as a professional librarian shall be conducted pursuant to this Article. Conclusions reached in the course of a review shall be reasonable and consistent with the information used in the review.

21.01.02 Formal evaluations of a member's performance may be used in any University appraisal of the member.

21.02 Performance Criteria

21.02.01 The duties and responsibilities of a member which may be subject to performance review encompass four fields of activity:

- (A) professional service;
- (B) service to the University;
- (C) service to the profession and the community; and
- (D) research and other scholarly activities.

21.02.02 A review of a member's professional service performance shall be based on the following criteria as they relate to the member's assigned duties and responsibilities during the period in review:

- (A) quality and consistency of performance and effective application of knowledge and skills;
- (B) organization of work, including the ability to set priorities, to choose efficient means of accomplishing goals and to use time effectively;
- (C) quantity and timeliness of work, including the level of productivity and ability to meet deadlines;
- (D) judgement, including recognition of problems, decision making and the ability to assess alternate solutions and the consequences of recommendations;
- (E) communication skills, including the ability to communicate effectively in speech and in writing, and the ability to gain the confidence, cooperation and respect of others;
- (F) initiative, including choosing objectives, resourcefulness and creative innovation, flexibility and responsiveness to new ideas; and
- (G) supervisory skills, where applicable.

21.02.03 A review of a member's performance in service to the University, service to the profession and the community, and research and other scholarly activities, shall be based on the following criteria:

- (A) effectiveness of service to the University, as evidenced by successful service on University committees, activities that further the welfare of the University, etc. (pursuant to Article 16.09);
- (B) active participation in professional and/or scholarly organizations, and/or professionally related community service (pursuant to Article 16.10); and
- (C) scholarly ability (where a member is engaged in research or other scholarly activities (pursuant to 16.11).

21.03 The standards of performance that can be reasonably expected within the various criteria stated in 21.02 vary with the experience, administrative responsibilities, type of appointment and position of the members.

21.04 **Performance in a Probationary Appointment**

21.04.01 The professional service performance of a member on a probationary appointment shall be formally reviewed at three (3) month intervals. The University Librarian shall be responsible for the formal reviews.

21.04.02 The performance of a member shall be reviewed on the basis of the criteria described in 21.02.02.

21.04.03 The University Librarian shall provide the member with a written copy, including copies of all documentation, of his/her evaluation of a member's performance at least three (3) days in advance of a meeting with the member to discuss his/her performance. The member shall sign the report to signify that he/she has read the review and has discussed his/her performance at the meeting with the University Librarian. The signature does not indicate that the member agrees with the evaluation.

21.04.04 At the conclusion of a probationary or extended probationary period, a performance review pursuant to this Article that concludes that the member has not met the standards of performance required for a continuing appointment shall be just cause for termination of the appointment.

21.05 **Performance in a Continuing Position**

21.05.01 The parties recognize that no periodic, structured performance review substitutes for regular communication between the University Librarian and a member, for constructive staff relations or for addressing staff problems promptly and reasonably.

21.05.02 The performance of a member on a continuing appointment shall be formally reviewed after receipt of the Librarian member's activity report for the year by the University Librarian. The performance review shall be for the immediately preceding period from July 1 to June 30th. At the meeting held on or before July 31st pursuant to 21.05.06, an exchange of information on the state of Library operations and of issues of concern shall be encouraged.

21.05.03 The performance of a member shall be reviewed on the basis of the criteria described in 21.02.

21.05.04 Prior to carrying out the performance review, the University Librarian, on his/her own initiative may, or on the request of the member shall, obtain written information about and/or evaluation of the member's work from other librarians, University colleagues, library users and/or professional associates. When the University Librarian does so on his/her own initiative, he/she shall so inform the member in advance.

- 21.05.05 Depending on the degree of a member's participation in service to the University pursuant to 16.09, in service to the profession and the community pursuant to 16.10 and in research and other scholarly activities pursuant to 16.11, professional service performance pursuant to 21.02.02 shall be given a majority weighting and other performances pursuant to 21.02.03 shall be given a lesser weighting in the performance review. A librarian member who believes that his/her weighting is inappropriate has the right to have the Provost and Vice-President (Academic) review his/her weighting.
- 21.05.06 The University Librarian shall provide the member with a written copy, including copies of all documentation, of his/her evaluation of a member's performance at least three (3) days in advance of a meeting with the member to discuss his/her performance. The member shall sign the report to signify that he/she has read it and has discussed his/her performance at the meeting with the University Librarian. If there is disagreement with the evaluation, the member shall so indicate upon the signing of the report. Within three (3) days of the meeting the member shall provide a concise written statement of his/her reasons for dissent and this statement shall be attached to and become part of the evaluation report. Failure to supply a statement of disagreement shall be taken as acceptance of the University Librarian's evaluation.

21.06 **Documentation**

All documentation used on a review shall be dated and attached to the report prepared by the University Librarian with respect to the review, and filed in the member's official personnel file. No anonymous material may be used. When the University Librarian believes that confidential material, from the member's official personnel file or gathered pursuant to 21.05.04, should be used, the member shall be given a typed copy of such confidential material, edited to remove statements that could identify the author.