

**APPENDIX 2**  
**PROCEDURES AND CRITERIA FOR LIBRARIAN EVALUATION, REAPPOINTMENT,  
PROMOTION, AND PERMANENT STATUS**

**I. OVERVIEW OF LIBRARIAN EVALUATION, REAPPOINTMENT, PROMOTION, AND PERMANENT STATUS**

**A. General Principles**

1. Minimum requirements for appointment, promotion, and permanent status of librarians are established by the University System of Maryland (USM) Board of Regents and are stated in the “II-1.00 University System of Maryland Policy on Appointment, Rank and Tenure of Faculty” (<https://www.usmd.edu/regents/bylaws>), which may be amended from time to time. The provisions of the USM policy supersede any conflicting provisions in TU policies.
2. Appointment is ordinarily at the rank of Librarian I.
3. At the time of a librarian’s initial appointment to a position in the Towson University Libraries, the Dean of University Libraries, with the approval of the Provost, shall assign to that individual an initial rank that is, in the Dean’s judgment, commensurate with the individual librarian’s prior professional accomplishments and attainments, as guided by promotional criteria (see Section II.C).
4. All permanent status, permanent status-track, and visiting and/or post-master’s residency librarians who have been employed at the Towson University Libraries for a period of at least twelve (12) months shall be evaluated annually according to the criteria (see Section II.B) and procedures (see Section III.D.2) described herein. A newly appointed librarian shall receive a written interim review from the librarian’s department chair/supervisor, with a copy provided to the Dean of University Libraries (“Dean”), six (6) months after the initial appointment (see Section III.D.1).
5. Librarians shall be evaluated for promotion or permanent status according to the criteria (see Section II.C and II.D) and procedures (see Section III.D.4) described herein. For applicability of criteria, see Section II.A.7.
6. Review for permanent status must be initiated by no later than the beginning of a librarian’s sixth year of continuous service (or full-time equivalent) as a permanent status-track librarian at Towson University.
7. A librarian must hold the rank of Librarian II or higher in order to apply for permanent status. Librarians appointed at the rank of Librarian I must apply for promotion to Librarian II by no later than the beginning of the fifth year

of continuous service (or full-time equivalent) as a permanent status-track librarian at Towson University.

8. Upon appointment, a librarian shall receive a contract specifying rank, the mandatory year for permanent status review, and, as applicable, the mandatory year for promotional review for advancement to Librarian II.
9. Librarians may apply for promotion to Librarian III and Librarian IV as described herein.
10. In the event that any deadline herein falls on a non-business day (i.e., a weekend or Towson University holiday), the deadline shall be adjusted to the subsequent business day.
11. The policies and procedures herein may be amended (see Section IV.D, "Development of PPSRM Policies and Procedures").

#### B. Standards and Expectations

The general criteria for initial appointment, annual evaluation, promotion, and permanent status measure the librarian's contributions to the Towson University Libraries ("Libraries"), the University, and the library profession. These criteria include quality of performance in the areas of librarianship, scholarship, and service. The criteria are not all necessarily weighted equally; the degree of importance given to any one criterion may vary from one librarian to another, depending on the particular position(s) held within the review period, as outlined in each librarian's applicable position description(s).

#### C. Definition of Evaluation Categories

##### 1. Librarianship

The librarian is expected to demonstrate competence in the librarian's assigned areas of responsibility, such as library instruction, collection development, bibliographic organization, reference, research services, discipline specialty, management, or some combination thereof. Among the factors to be considered are: quality and consistency of performance; ability to innovate; initiative; leadership; ability to work effectively with others; amount of responsibility assigned to the librarian; ability to organize work and complete tasks promptly; ability to relate job functions to the more general goals of the Libraries and University; dependability; accuracy; oral and written skills; judgment; professional attitude; adaptability; participating and providing input to library program designs and solutions; and demonstrated commitment to the mission of the Libraries.

2. Scholarship, Research, Publications, Creative Works, and Professional Leadership

Scholarship may be in the form of books, articles, book reviews, editorships, bibliographies, handbooks, digital objects, creative works, and lectures. The librarian is expected to demonstrate continued academic study related to the profession and/or the programs of the University. Continuing education includes formal courses, seminars and workshops, as well as advanced degrees obtained or in progress. Meaningful participation in professional activities on local, state, regional, and national levels includes offices held, committee assignments, papers presented, awards received, and leadership in the design and development of seminars and workshops.

3. Service

Service shall include substantive participation in the shared governance activities of the Libraries and University. Service also includes special major projects with academic departments and participation in relevant work of the University System of Maryland, such as the University System of Maryland and Affiliated Institutions Library Consortium. Civic service, which may be considered in this category, includes participation in the larger community (local, regional, national or global) outside the University in ways that may or may not be directly related to the librarian's academic expertise, but in ways which advance the University's mission.

D. Part-Time Librarians

1. Part-time librarians may be employed at the ranks of Librarian I, Librarian II, Librarian III, or Librarian IV.
2. Appointment, reappointment, permanent status, promotion, and termination of part-time permanent status-track librarians shall be consistent with the policies and procedures established for full-time permanent status-track librarians.
3. In order to be considered eligible for permanent status, a part-time librarian's commitment shall be at least fifty percent (50%) time for the fiscal year.
4. The length of employment for consideration for Librarian II shall ordinarily be based upon the number of full-time equivalent years accrued by the librarian at the institution in a permanent status-track position. For example, Librarian II review for a half-time (50%) librarian must be initiated no later than the beginning of the eleventh year of service at Towson University.
5. The length of employment for permanent status consideration shall ordinarily be based upon the number of full-time equivalent years accrued by the

librarian at the institution in a permanent status-track position. For example, permanent status review for a half-time (50%) librarian must be initiated no later than the beginning of the twelfth year of service at Towson University.

6. Part-time librarians at the ranks of Librarian I, Librarian II, Librarian III, and Librarian IV are eligible for full-time positions consistent with institutional policies.

## **II. EVALUATION CRITERIA**

### **A. General Principles**

1. Years of service at the Towson University Libraries must be in a permanent status-track position in order to be counted toward eligibility for promotion or permanent status, unless otherwise noted.
2. Years of service shall be counted according to the fiscal year, i.e., starting July 1. An initial partial year of ten (10) months or more, i.e., appointment beginning September 1 or earlier in the fiscal year, shall be considered a librarian's first year of service.
3. For part-time librarians' eligibility for ranks, permanent status, and full-time equivalency for years of service, see Section I.D.
4. For a librarian with prior experience in a visiting and/or post-master's degree residency position at the Towson University Libraries, length of employment for promotion and permanent status consideration shall be negotiated at time of appointment to a permanent status-track position, as applicable.
5. A librarian may apply for early promotion or permanent status review, ordinarily with support of the department chair/supervisor, in recognition of superior performance and extraordinarily advanced professional development. A librarian may withdraw from early promotion or permanent status review at any time prior to submission to the Provost, without prejudice to any future review eligibility. If granted, early promotion shall not impact the mandatory permanent status review year as stated in the librarian's contract. If not granted early promotion, a librarian may reapply (see Section III.D.5). However, a librarian who applies for, and is denied, permanent status at any time may not reapply (see Section III.D.6). For minimum years of service and other criteria, see Section II.C and II.D.
6. Librarians on the permanent status track may be granted a one-year extension of the mandatory promotion and/or permanent status review year upon written request to and subsequent recommendation by the Dean, with final

approval granted at the sole discretion of the Provost. Librarians may request that Librarian II and permanent status reviews be extended concurrently.

Librarians must provide documentation that:

- a. they have primary or equal responsibility for the care of a newborn or newly adopted child; or
- b. they or a family member suffer from a medical illness, disability, or injuries that interfere with their ability to meet professional responsibilities; or
- c. they have suffered substantial damage to their research or research facilities and/or experienced other circumstances that would adversely affect the permanent status or Librarian II application, due to occurrences beyond their control (e.g., fire, flood, earthquake, riot, act of God, act of war or terrorism, or other disasters).

Any agreement to extend the mandatory review year for promotion to Librarian II and/or permanent status according to Appendix 2 (see Section I.D.4 and I.D.5 and Section II.C.2 and II.D.4) or as stated in the librarian's contract shall not be effective unless the librarian's contract is amended and signed by the librarian, the Dean, and the Provost.

If the mandatory review year is extended under this provision and the librarian is denied promotion to Librarian II or permanent status, then the librarian shall have the same rights to a terminal year as if the mandatory review year had not been extended.

7. Librarians shall be evaluated for promotion to the rank of Librarian II or for permanent status pursuant to the standards and criteria in effect during the year in which they are first appointed to a permanent status-track position. Librarians seeking promotion to the rank of Librarian III or Librarian IV shall be evaluated pursuant to the standards and criteria in effect during the year in which they apply for promotion.

**B. Criteria for Annual Performance Evaluation and Guidelines for Merit for Librarians**

1. The annual performance evaluation serves as the basis for recommending annual merit salary increases. There are three categories of evaluation: librarianship; scholarship, research, publications, creative works, and professional leadership; and service. Librarianship will be the most heavily weighted of the three evaluation categories. Ratings will take into consideration the performance of librarians at different levels of experience and responsibility. Expectations for performance increase with years of experience and the addition of responsibilities. The position description is the starting point for the evaluation process. It is the joint responsibility of the

librarian and department chair/supervisor to set goals in the areas of librarianship, scholarship, and service for the coming year and to establish priorities. Annual goals should be challenging, realistic, and support the mission and goals of the Libraries and University.

## 2. Criteria for Evaluating Performance in Librarianship

The following factors will be considered in evaluating performance in librarianship: quality and consistency of performance; ability to innovate; initiative; leadership; ability to work effectively with others; amount of responsibility assigned to the librarian; ability to organize work and complete tasks promptly; ability to relate job functions to the more general goals of the Libraries and University; dependability; accuracy; oral and written skills; judgment; professional attitude; adaptability; fulfilling basic obligations of attendance; participating and providing input to library program designs and solutions; and demonstrated commitment to the mission of the Libraries and University.

- a. **Outstanding (3):** The assignment of “outstanding” is based on a consistently high level of performance and the superior nature of the contribution must be evident. The quality, innovation, sustained effort, reliability and initiative demonstrated by the librarian are considered when assigning a rating of outstanding. Characteristics of this rating may include but are not limited to the following:
  - i. Demonstrates special efforts and/or exhibits unusual success in the area of job responsibility.
  - ii. Accomplishes annual goals in an exemplary manner with goals that advance the Libraries’ and University’s missions and strategic plans.
  - iii. Assumes new responsibilities or assignments beyond current position that require a commitment of time, energy and other resources.
  - iv. Provides leadership or major contribution to activities which result in a significant impact and improvement of library services.
- b. **Meets Expectations (2):** The assignment of “meets expectations” indicates that the librarian consistently and adequately fulfills the responsibilities of the position. Characteristics of this rating may include but are not limited to the following:
  - i. Understands and executes job responsibilities independently and thoroughly, and accomplishes a majority of annual goals.

- ii. Furthers the service unit's goals and objectives through active participation.
  - iii. Accepts and performs library assignments in addition to current job responsibilities.
  - iv. Demonstrates knowledge of library policies and procedures and the interrelationships of various service units.
- c. **Needs Improvement (1):** The assignment of "needs improvement" indicates that the librarian does not meet important responsibilities of the position. Characteristics of this rating may include but are not limited to the following:
- i. Does not accept or fulfill work assignments appropriate to statement of job responsibilities.
  - ii. Does not perform in accordance to library mission, policies or procedures.
  - iii. Is ineffective in carrying out primary duties.
  - iv. Demonstrates inappropriate professional behavior.
  - v. Fails to work toward improving problematic performance.
3. **Criteria for Evaluating Performance in Scholarship, Research, Publications, Creative Works, and Professional Leadership**

While the quantity of work in a given year is considered, more important is the quality of work and its research or creative value as demonstrated by publication or presentation. Additional factors include originality, independence of contribution and reputation of the publication. Scholarship in library science or chosen subject specialties is to be considered. Research-in-progress may be considered if it leads to publication or presentation within a reasonable amount of time. Research-in-progress may be considered but then not again for the following year. The impact of the librarian's work will be evidenced by citation patterns, requests for presentations, and other means. Creative works must be relevant directly to the field of academic librarianship or area of library expertise.

- a. **Outstanding (3):** The assignment of "outstanding" includes a very active, productive research and leadership agenda. Characteristics of this rating may include but are not limited to the following:

- i. Has evidence of significant contributions to the profession through such efforts as having published an article, book, book chapter, presented a scholarly paper or workshop at a national or regional conference.
  - ii. Has receipt of an externally funded grant.
  - iii. Has held a leadership role and made a significant contribution in a national or regional professional organization.
  - iv. Has evidence of outstanding creative work that demonstrates originality and/or innovation and that makes a significant impact on library services or mission.
- b. **Meets Expectations (2):** The assignment of “meets expectations” includes a productive research agenda. Characteristics of this rating may include but are not limited to the following:
- i. Has an active research agenda and is working on projects that contribute to the profession of academic librarianship.
  - ii. Has contributed works such as a book review, newsletter article, or in-house publications during the year.
  - iii. Has given presentations or workshops on topics related to academic libraries, higher education and/or topics relevant to areas of responsibility.
  - iv. Has evidence of creative work that promotes the Libraries, University or profession.
  - v. Has participated in professional organizations, and/or has attended professional conferences, workshops and/or staff development activities.
- c. **Needs Improvement (1):** The assignment of “needs improvement” indicates no or minimal scholarship, research, creative work, or professional activity. Characteristics of this rating may include but are not limited to the following:
- i. Has no active scholarship, creative work, or research agenda.
  - ii. Has no evidence of professional activity.

4. Criteria for Evaluating Performance in Service

University service and civic service fall within the service category. The librarian has the responsibility to document the impact of participation in furthering the service and outreach mission of the Libraries and University.

- a. **Outstanding (3):** The assignment of “outstanding” includes a high level of significant service activity. Characteristics of this rating may include but are not limited to the following:
  - i. Significant University service or civic service within the University community or its constituencies.
  - ii. Successful service on two or more non-library Towson University, University System of Maryland, or regional committees, governing boards, task forces, or project teams.
  - iii. Leadership role in at least one committee or organization.
- b. **Meets Expectations (2):** The assignment of “meets expectations” includes productive service activities. Characteristics of this rating may include but are not limited to the following:
  - i. Participation in library or University committees.
  - ii. Civic service through outreach activities.
- c. **Needs Improvement (1):** (Minimal service activities)
  - i. Failure to participate in library or University service.
  - ii. No active service record at any level (library, University, civic, state, regional or national).

5. There will be three levels of merit as follows:

**Excellent – Outstanding (Base Merit Plus):** Librarians who are not only deemed satisfactory, but who also have a rating of “excellent – outstanding” in librarianship and in at least one additional category of evaluation, and with no categories with a rating of “unsatisfactory.”

**Satisfactory – Meets Expectations (Base Merit):** Librarians whose work is deemed competent and thus contributes to fulfilling the mission of the Libraries and University. To qualify for base merit, librarians shall demonstrate achievement in librarianship, scholarship, and service consistent with their job responsibilities and receive a rating of “satisfactory – meets expectations” or higher in librarianship and in at least one additional category

of evaluation, and with no categories with a rating of “unsatisfactory.”  
Unsatisfactory – Needs Improvement: Librarians whose performance fails to adequately meet explicit standards, as evidenced by a rating of “unsatisfactory” in one or more categories of evaluation.

C. Criteria for Promotion of Librarians

1. The following criteria also apply to the appointment of librarians at the corresponding ranks, as assigned by the Dean at time of appointment, with the exception of minimum years served at Towson University. Appointment at Librarian II or higher must be approved by the Provost.
2. Librarian II requirements: Ordinarily a minimum of three (3) years of professional experience is required. However, a librarian shall not be eligible for promotion until the librarian has also served at least twelve (12) continuous months (or the full-time equivalent) in a permanent status-track position at Towson University. A librarian appointed at the rank of Librarian I must apply for promotion to Librarian II by no later than the beginning of the fifth continuous year (or full-time equivalent) of service at Towson University in a permanent status-track position. Candidates must meet all requirements listed below.
  - a. Librarianship:
    - i. Meet or exceed standards in all categories in the annual performance evaluations required for the evaluation portfolio (see Section III.B.4.b.ii), unless documentation is provided to indicate that any “below standards” ratings were fully addressed and corrected prior to the submission of the candidate’s portfolio.
    - ii. Substantive contribution to the maintenance or improvement of quality in library services and resources, with documentation of specific contributions.
    - iii. Successful completion of one or more significant and relevant projects for the Libraries, or completion of one or more regional or national library projects that were pre-approved by the appropriate department chair/supervisor and Dean.
    - iv. Application of broad knowledge of librarianship and in-depth knowledge of specialties within areas of responsibility to serve the Towson University Libraries and Towson University missions.

- b. Scholarship, Research, Publications, Creative Works, and Professional Leadership:
    - i. Continuing study and ongoing enhancement of knowledge level in areas of responsibility  
OR  
Publications, creative works, or significant reports in which the candidate served as lead.
    - ii. Active membership in at least one relevant professional organization.
    - iii. Attendance at professional meetings.
  - c. Service:
    - i. Participation in Towson University Libraries committees.
    - ii. Participation in shared governance activities and other committees or projects of the University beyond those of the Libraries. This may include participation in and contribution to special major projects with academic departments, or with the University System of Maryland and Affiliated Institutions (USMAI) Library Consortium. Participation in civic service may be included in this category.
3. Librarian III requirements: Ordinarily a minimum of six (6) years of professional experience is required, three (3) of which must be at, or comparable to, the level of Librarian II at Towson University. A part-time librarian shall be eligible after the corresponding number of full-time equivalent years; for example, ordinarily a minimum of twelve (12) years of professional experience is required for a half-time (50%) librarian. However, a librarian shall not be eligible for promotion until the librarian has also served at least twelve (12) continuous months (or the full-time equivalent) in a permanent status-track position at Towson University. In addition to the requirements for Librarian II, candidates must meet all of the following requirements except as noted.
- a. Librarianship:
    - i. Performance, leadership, and initiative beyond the level required of Librarian II for areas of direct responsibility.
    - ii. Performance, leadership, and initiative in projects and assignments which extend beyond areas of direct responsibility.

- b. Scholarship, Research, Publications, Creative Works, and Professional Leadership:
    - i. Performance, leadership, and initiative in this category beyond that required for Librarian II.
    - ii. At least three works from any of the following categories: publications in peer-reviewed journals (or works accepted for publication in such journals); presentations at state, regional or national meetings in areas of library expertise; or creative works directly relevant to the field of academic librarianship or the librarian's area of specialization. A significant grant for which the candidate took primary responsibility may be substituted for a peer-reviewed publication.
  - c. Service:
    - i. Performance, leadership, and initiative in this category beyond that required for Librarian II.
    - ii. Successful service of at least two years on two or more shared governance activities and other committees or projects of the University beyond those of the Libraries. This may include participation in and contribution to special major projects with academic departments, or with the University System of Maryland and Affiliated Institutions (USMAI) Library Consortium. Participation in civic service may be included in this category.
4. Librarian IV requirements: Appointment or promotion to this rank is exceptional. Ordinarily a minimum of nine (9) years of full-time professional experience is required, at least three (3) of which must be at, or comparable to, the level of Librarian III at Towson University. A part-time librarian shall be eligible after the corresponding number of full-time equivalent years; for example, ordinarily a minimum of eighteen (18) years of professional experience is required for a half-time (50%) librarian. However, a librarian shall not be eligible for promotion until the librarian has also served at least twelve (12) continuous months (or the full-time equivalent) in a permanent status-track position at Towson University. In addition to meeting the criteria for Librarian II and Librarian III noted above, the candidate must have made distinctive contributions to the Libraries, Towson University, the library profession, and/or an academic discipline that clearly set the candidate among the top professionals in academic librarianship. These contributions will include three or more of the following:

- a. Leadership and completion of major projects that benefit the Towson University Libraries, Towson University, the University System of Maryland, or libraries region-wide.
- b. Proposal, receipt and successful completion of a major grant.
- c. Consistent leadership or excellence in librarianship over an extended period of time that has benefited other librarians and library staff.
- d. Regional or national leadership demonstrated either by holding high office in professional associations or otherwise making significant contributions to the field.
- e. An outstanding publication record.
- f. Achieving exceptional formal recognition, honors or awards for outstanding service, teaching or leadership in the field.

**D. Criteria for Permanent Status of Librarians**

1. Permanent status is continued employment by the University such that a decision to remove a librarian must be made by the President and must be justified by cause as defined in the Towson University Policy on Appointment, Rank, and Tenure of Faculty, and applicable Board of Regents' policies. Permanent status shall be awarded only by an affirmative decision based upon a formal review as described in this policy.
2. Permanent status shall be granted only to those holding the rank of Librarian II, Librarian III, or Librarian IV and such other ranks as the University may adopt and the Board of Regents may approve; permanent status shall not be granted to an individual holding the rank of Librarian I.
3. Permanent status employment may be terminated only in accordance with the University's and Board of Regents' policies. Continued employment need not be in the same capacity.
4. Permanent status review shall be initiated no later than the beginning of the librarian's sixth year of continuous, full-time service, or full-time equivalent based on percentage of part-time employment, as a librarian at Towson University. Years of service shall be counted according to the fiscal year, i.e., starting July 1. An initial partial year of ten (10) months or more, i.e., appointment beginning September 1 or earlier in the fiscal year, shall be considered a librarian's first year of service.

5. At a minimum, a candidate for permanent status must have served at least twenty-four (24) continuous months (or the full-time equivalent) in a permanent status-track position at Towson University.
6. It is within the discretion of the Dean to request that the Librarian Promotion and Permanent Status Committee consider permanent status for a librarian's initial appointment. In order to appoint at the rank of Librarian II or higher with permanent status, the Librarian Promotion and Permanent Status Committee, including the alternate member, must vote by simple majority to affirm that rank and status at appointment. The Dean may then recommend the appointment at the approved rank and status to the Provost. Application for permanent status at the rank of Librarian II or higher requires documentation of rank and permanent status or its equivalent at the previous institution. Evaluation shall be guided by the permanent status criteria herein, with the exception of minimum years served at Towson University. The Provost and President must approve any appointment carrying permanent status.
7. The categories for evaluating librarians for permanent status are (1) librarianship; (2) scholarship, research, publications, creative works, and professional leadership; and (3) service, all as defined in Section I.C of this document, "Definition of Evaluation Categories." The expected contributions in each of these areas will vary considerably among librarians depending on their primary function(s) within the Libraries as outlined in each librarian's applicable position description(s) (see Section III.B.4.b.i).
8. Permanent status requires superior professional and intellectual attainment and potential. The quality of a librarian's performance and potential for professional growth and achievement will be judged in the evaluation categories listed in item 7 above and described in Section I.C of this document, "Definition of Evaluation Categories." To achieve permanent status a librarian must hold, at a minimum, a Master's degree in librarianship from an ALA-accredited library school.
9. Librarianship will be judged with respect to:
  - a. consistency of performance;
  - b. grasp of library methods and trends;
  - c. command of librarian's subject(s);
  - d. continued growth in librarian's field(s);
  - e. ability to innovate and take initiative;
  - f. ability to work effectively with others; and
  - g. ability to relate librarian's functions to the more general goals of the Libraries and the University.

10. Scholarship, Research, Publications, Creative Works, and Professional Leadership will be evaluated with regard to activities such as the following:
  - a. research or recognized contributions in fields relevant to the profession;
  - b. documented research in progress;
  - c. books, articles, book reviews, bibliographies, indexes, codifications, professional practices, presentations, and preparation of exhibits in professional or scholarly fields;
  - d. progress toward the completion of an advanced degree relevant to the profession and/or programs of the University;
  - e. courses taken toward improvement of subject knowledge;
  - f. membership and activity in professional and scholarly organizations, committees, and meetings;
  - g. related consulting or similar service; and
  - h. recognition of outstanding achievement or promise as evidenced by awards, fellowships, grants.
  
11. Service will be evaluated with regard to participating in activities such as the following:
  - a. library and University committees;
  - b. relevant work of the University System of Maryland; and
  - c. civic service to the larger community.

**III. PROCESS AND PROCEDURES FOR EVALUATION, REAPPOINTMENT, PROMOTION, AND PERMANENT STATUS****A. General Principles**

1. The following procedures shall be followed by all candidates and by all reviewers. The procedures have been established to promote consistency of application from one year to the next and to provide full and fair hearings for all candidates.
2. All parties shall be responsible for maintaining appropriate security and confidentiality of all materials and deliberations regarding annual evaluation, promotion, and permanent status reviews.
3. Each application for promotion or permanent status shall be considered solely on its own merits at the time it is submitted.
4. See Section V, “Appeals, Negative Recommendations, and Withdrawal from Evaluation,” for applicable withdrawal and appeals policies and procedures.
5. The final decision to grant or deny permanent status or promotion shall be made by the President.

**B. Portfolio Development**

1. The candidate is responsible for presenting a portfolio of material for the annual evaluation, promotion, or permanent status review.
2. Guided by library criteria and the department chair/supervisor, the candidate shall address the three categories of librarianship, scholarship, and service within the evaluation portfolio.
3. Portfolio materials for annual evaluation must include the following:
  - a. Librarian Annual Performance Evaluation (see Section VI). This form may be amended from time to time without the need to amend this policy.
  - b. Current curriculum vitae.
4. Portfolio materials for promotion or permanent status review must include a table of contents and must be organized, indexed, and placed in a three-inch binder, or submitted in an electronic format as designated by the Librarian Promotion and Permanent Status Committee (“Committee”) in consultation with the Dean. The portfolio must include the following:

- a. Items to Be Supplied by the Candidate
  - i. Copy of candidate's letter of intent to apply for promotion or permanent status sent to Dean.
  - ii. Copy of Dean's letter acknowledging candidate's letter of intent.
  - iii. Current curriculum vitae.
  - iv. Transcript(s) (optional) – original transcript(s) documenting any formal continuing studies during the review period.
  - v. Supporting Statement – document describing the correlation between expectations and accomplishments and integrating the candidate's accomplishments in the areas of librarianship, scholarship, and service over the review period. The statement shall be signed and dated by the librarian and the department chair/supervisor. The department chair/supervisor's signature signifies that the department chair/supervisor has read the document.
  - vi. Documentation of Librarianship.
  - vii. Documentation of Scholarship, Research, Publications, Creative Works, and Professional Leadership.
  - viii. Documentation of Service.
  - ix. List of References – Candidates seeking promotion in rank or permanent status shall provide the names of at least three and no more than five individuals, including at least one from outside the Towson University Libraries. References shall be asked for additional information concerning the candidate's professional responsibilities, capabilities and accomplishments. References may include librarians, faculty members, or other colleagues who have had sufficient contact with the candidate during the review period to be able to evaluate the librarian's professional skills and performance.
  - x. Commendations (optional) – Up to five unsolicited commendations and acknowledgements may be included.
  - xi. The candidate may provide any statement, evidence, or other documentation the candidate believes would present a more valid perspective of the candidate's performance in response to a Committee or Dean request for information, or to a

recommendation letter from the candidate's department chair/supervisor, the Committee, or Dean. Any such (optional) documentation shall be included in the Information Added section (see Section III.B.4.b.iii).

- b. **Items to Be Supplied by Others**
  - i. **Position Descriptions** – All position descriptions applicable within the review period, including but not limited to descriptions for prior librarian positions held at Towson University, shall be added to the portfolio by the Dean. All position descriptions included shall be signed and dated by candidate and Dean.
  - ii. **Performance Evaluations** – For candidates for promotion to Librarian II or permanent status, all completed Librarian Annual Performance Evaluations to date shall be included. For candidates for promotion to Librarian III or Librarian IV, all completed Librarian Annual Performance Evaluations since the prior promotional review period shall be included, up to a maximum of the five most recent evaluations. Peer observation(s) of teaching, as applicable, shall be attached to performance evaluations. These documents shall be added to the portfolio by the Dean. Any peer observation(s) completed in the period following the most recent annual review shall also be provided by the department chair/supervisor to the Dean to be added to this section of the portfolio.
  - iii. **Information Added** – The Committee or Dean may request additional information from inside or outside the Libraries as needed to make a recommendation. Within seven (7) calendar days of any request for additional information, the candidate shall be notified in writing by the Committee chair about the additional information needed and from whom it is requested. The request for information, notification to candidate, and the response shall be added to the portfolio by the Committee chair or Dean, in a separate Information Added section.
  - iv. **Recommendations**
    - (a) **Recommendation of department chair/supervisor**, supplied by department chair/supervisor. The candidate shall forward a copy of the candidate's current curriculum vitae and request that the candidate's department chair/supervisor send a recommendation including a full evaluation of the candidate's qualifications for promotion or permanent status to the Committee chair by September 1. In the event that the

current department chair/supervisor has served in this capacity less than one (1) year and/or the candidate has served in a previous librarian position at Towson University during the review period, the prior department chair/supervisor(s), if still at Towson University, shall also be contacted. Recommendations from applicable department chairs/supervisors shall be copied to the candidate by September 1 and shall also be included in the portfolio as it proceeds through the process.

- (b) Recommendation of Librarian Promotion and Permanent Status Committee, including results of the Committee vote, supplied by Committee chair.
- (c) Recommendation of Dean, supplied by Dean.

5. **Additional Materials for Promotion or Permanent Status Review**

- a. **References** – The chair of the Librarian Promotion and Permanent Status Committee shall solicit letters from the candidate’s references assessing the candidate’s qualifications for promotion or permanent status. The letters shall not be included in the evaluation portfolio but shall be forwarded under separate cover to each subsequent level of review.
- b. **External Reviews** – If confidential external reviews are solicited by the Committee pursuant to librarian promotion and permanent status policies, they shall remain confidential and shall not be made available to the candidate. Within seven (7) calendar days of any request for an external review, the candidate shall be notified in writing by the Committee chair that the request was made and from whom the external review was requested. The notification to the candidate shall be added to the portfolio by the Committee chair, in the Information Added section. The external reviews shall not be included in the evaluation portfolio but shall be forwarded under separate cover to each subsequent level of review.

6. **Summative Portfolio to Be Submitted to Provost**

In addition to the evaluation portfolio, candidates being reviewed for promotion or permanent status shall also prepare a summative portfolio for the Provost. Contents shall be drawn from materials included in the full evaluation portfolio. The summative portfolio shall be clearly labeled with the candidate’s name, name of library, type of review, and review period; compiled in a one-inch binder; indexed; and in the order listed as follows:

- Section I Curriculum vitae. A copy of one recent professionally relevant publication or documentation of creative work or presentation in area of library expertise.
- Section II Librarian Annual Performance Evaluations, arranged with most recent first, as required for the evaluation portfolio (see Section III.B.4.b.ii). Peer observation(s) of teaching, as applicable, shall be attached to performance evaluations. Any peer observation(s) completed in the period following the most recent annual review shall also be included in this section.
- Section III Supporting Statement
- Summary statement describing correlation between expectations and accomplishments and integrating accomplishments in the areas of librarianship, scholarship, and service.
- Section IV Recommendations
- Written recommendation of the department chair/supervisor (to include prior department chairs/supervisors as applicable; see Section III.B.4.b.iv).
  - Written recommendation of the Librarian Promotion and Permanent Status Committee.
  - Written recommendation of the Dean.

C. Document Storage

1. The Dean shall maintain a copy of all official documents concerning interim review, annual evaluation, promotion, and permanent status. Documents concerning promotion and permanent status shall be kept in a secure file apart from the candidate's personnel file. All official evaluation documents and recommendations shall be retained in their entirety in the Dean's office and then destroyed only after five (5) years following the separation of the candidate from employment at Towson University.
2. The official letters concerning recommendations for promotion and permanent status shall be maintained by the Provost, as Chief Academic Officer of the University.

## D. Evaluation Procedures, Calendar, and Timetable

### 1. Interim Review Process and Calendar

- a. A newly appointed librarian shall meet with the librarian's department chair/supervisor within twenty-one (21) calendar days after the librarian's date of appointment to establish initial goals for professional development within the areas of librarianship, scholarship, and service.
- b. The department chair/supervisor shall initiate the interim review process by notifying the librarian no later than fourteen (14) calendar days after the completion of the sixth month of service.
- c. No later than fourteen (14) calendar days after notification by the department chair/supervisor, the librarian shall complete designated sections of the Librarian Interim Review (see Section VI), describing activities and accomplishments for the initial six-month review period, and submit to the department chair/supervisor.
- d. The department chair/supervisor shall review the Librarian Interim Review and complete designated sections of the review, forwarding a copy to the librarian within seven (7) calendar days of receiving the review.
- e. The department chair/supervisor shall schedule a meeting with the librarian to discuss the review no later than fourteen (14) calendar days after forwarding the review to the librarian. To facilitate discussion, the department chair/supervisor shall forward a copy of designated sections of the review to the librarian at least one (1) calendar day prior to the scheduled meeting date.
- f. At the conclusion of the meeting, the librarian and department chair/supervisor shall sign the Librarian Interim Review. The librarian's signature shall indicate that the librarian has read and discussed the review with the department chair/supervisor; signature does not necessarily indicate agreement with the review. Failure to sign shall not prevent the review from being forwarded to the Dean.
- g. The department chair/supervisor shall forward a copy of the completed, signed review to the Dean within seven (7) calendar days of the meeting between the librarian and department chair/supervisor.
- h. In the event that a librarian wishes to respond to, clarify, or rebut any aspect of the review, the librarian may provide a response as well as any additional evidence or other documentation the librarian believes would present a more valid perspective of the librarian's performance.

Any response or additional information must be forwarded to the Dean, with a copy to the department chair/supervisor, within twenty-one (21) calendar days of the meeting between the librarian and department chair/supervisor.

2. Annual Evaluation Process and Calendar

- a. The department chair/supervisor shall annually evaluate the performance of all permanent status, permanent status-track, and visiting/post-master's degree residency librarians who have been employed at the Towson University Libraries for a period of at least twelve (12) months, within the areas of librarianship, scholarship, and service according to the "Criteria for Annual Performance Evaluation and Guidelines for Merit for Librarians" (see Section II.B).
- b. The annual performance evaluation shall serve as the basis for recommending applicable annual merit salary increases.
- c. Annual evaluation of permanent status-track librarians shall also function as review for reappointment (see Section III.D.3).
- d. The annual review shall be completed during the spring semester of the Academic Year and shall be based on the librarian's performance during the prior calendar year.
- e. January 28 – Each librarian shall prepare an evaluation portfolio (see Section III.B.3 and Section VI). The librarian shall submit the evaluation portfolio to the department chair/supervisor by January 28.
- f. February 28 – The department chair/supervisor shall review the evaluation portfolio, complete designated sections of the Librarian Annual Performance Evaluation, and schedule a meeting with each reporting librarian to occur by February 28. The purpose of this meeting is to allow the department chair/supervisor to discuss the evaluation (including librarianship reflection and peer observation(s) of teaching, as applicable) with the librarian. To facilitate discussion, the department chair/supervisor shall forward a copy of designated sections of the Librarian Annual Performance Evaluation to the librarian at least one (1) calendar day prior to the scheduled meeting date.
- g. In the event that a librarian wishes to respond to, clarify, or rebut any aspect of the evaluation, the librarian may at the time of the meeting provide a written response as well as any additional evidence or other documentation the librarian believes would present a more valid perspective of the librarian's performance. This information shall be added to the evaluation portfolio by the department chair/supervisor.

- h. At the conclusion of the meeting, the librarian and department chair/supervisor shall sign the Librarian Annual Performance Evaluation. The librarian's signature shall indicate that the librarian has read and discussed the evaluation with the department chair/supervisor; signature does not necessarily indicate the librarian's agreement with the evaluation. Failure to sign shall not prevent the evaluation from being forwarded to the next evaluation level.
- i. March 1 – The department chair/supervisor shall forward the evaluation portfolio, including the completed, signed Librarian Annual Performance Evaluation with recommendation, to the Dean by March 1.
- j. March 1 – The Dean shall review the evaluation portfolio and provide a signed copy of the evaluation to the librarian and department chair/supervisor by March 1.
- k. March 4 – If the Dean makes a negative recommendation (i.e., a rating of “unsatisfactory – needs improvement”), the Dean shall notify the department chair/supervisor and the librarian in writing. The recommendation shall contain reference to each category evaluated, i.e., librarianship, scholarship, and service. The Dean shall deliver the recommendation to the librarian in person or send by certified mail to the librarian's last known address by March 4. The Dean shall also be responsible for adding this recommendation to the librarian's evaluation portfolio by March 4.
- l. March 25 – The Dean shall provide a record of librarian recommendations to the Provost by March 25.
- m. A librarian may appeal a negative annual review recommendation (includes merit) at any point in the process, following appeals procedures outlined in Section V.B; however, an appeal shall not stay the evaluation process. The Provost's decision on merit shall be final and cannot be appealed.
- n. July 1 – For librarians receiving recommendations for “meets expectations” or “outstanding,” increase in pay due to applicable merit shall be awarded July 1 of the subsequent fiscal year.
- o. In the event that the department chair/supervisor, the Dean, or the Provost implementing these procedures anticipates that despite their reasonable efforts they will be unable to meet a deadline provided herein, they shall promptly identify a date certain by which they expect to complete the work associated with the deadline. They shall then notify the librarian in writing of the schedule change and provide a copy of the notification to the department chair/supervisor, the Dean,

and the Provost. A copy of the notification shall be added to the portfolio by the current reviewer. Any extension does not alter the April 15 deadline for notice of termination, as applicable (see Section III.D.3).

### 3. Reappointment

- a. Permanent status-track librarians and visiting/post-master's degree residency librarians shall be reviewed for reappointment during annual performance evaluations.
- b. A positive annual evaluation recommendation from both the librarian's department chair/supervisor and the Dean shall result in reappointment for the subsequent fiscal year.
- c. A librarian may appeal a negative reappointment recommendation at any point in the process, following appeals procedures outlined in Section V.B; however, an appeal shall not stay the reappointment evaluation process.
- d. April 15 – If the Provost accepts a negative reappointment recommendation, written notice shall be delivered to the librarian in person or sent by certified mail to the librarian's last known address by April 15; otherwise, the appointment is renewed automatically for one (1) additional year.
- e. A negative reappointment recommendation by the Provost may be appealed to the President, but the President's decision on reappointment shall be final and cannot be appealed.
- f. For a librarian in the first or second year of service at the University, the Provost must send written notice of non-reappointment by no later than April 15 to terminate at the beginning of the subsequent fiscal year. If notice is delivered after April 15, one (1) full year's notice of non-reappointment shall be given.
- g. A librarian in the third through fifth year of service (or full-time equivalent) at the University must receive one (1) full year's notice of non-reappointment.
- h. A librarian given notice of termination shall not be eligible for promotion or permanent status review.

4. Promotion and Permanent Status Review Process and Calendar
  - a. June 1 – Preparation begins for promotion and permanent status review cycles.
    - i. No later than June 1, the Dean shall notify all Librarian I's who will be beginning their fifth year of continuous, full-time service at Towson University on July 1 that they must now apply for promotion. For part-time librarians, notification shall be provided at the full-time equivalent year of service at Towson University; for example, the Dean shall notify all half-time (50%) Librarian I's who will be beginning their eleventh year of continuous service on July 1 that they must now apply for promotion.
    - ii. No later than June 1, the Dean shall notify all permanent status-track librarians who hold the rank of Librarian II or higher and who will be beginning their sixth year of continuous, full-time service at Towson University on July 1 that they must now apply for permanent status. For part-time librarians, notification shall be provided at the full-time equivalent year of service at Towson University; for example, the Dean shall notify all half-time (50%) permanent status-track librarians who hold the rank of Librarian II or higher and who will be beginning their twelfth year of continuous service at Towson University on July 1 that they must now apply for permanent status. The librarians' department chairs/supervisors shall also be notified.
    - iii. Except as provided in items "i" and "ii" above, librarians are responsible for tracking their own eligibility for review and for initiating the review process at the appropriate time, if they so elect.
  - b. June 15 – To initiate the review process, a librarian must send a letter of intent to apply for promotion or permanent status to the Dean, to be copied to the chair of the Librarian Promotion and Permanent Status Committee and applicable department chairs/supervisors, by no later than June 15.
  - c. August 15 – September 15 – Candidate's portfolio is completed and references are submitted.
    - i. The candidate for promotion or permanent status must submit a portfolio to the Dean by August 15 (see Section III.B.4). The Dean shall confirm receipt of the portfolio in writing to the candidate.

- ii. The candidate must provide a copy of the curriculum vitae included in the candidate's evaluation portfolio to applicable department chairs/supervisors (see Section III.B.4.b.iv) by August 15, with a copy to the Committee chair. The candidate shall request that the department chair/supervisor(s) send a recommendation to the Committee chair, with a copy to the candidate, by September 1.
- iii. The Dean shall add to the portfolio a current, signed position description (as well as additional, applicable position descriptions; see Section III.B.4.b.i) and copies of the candidate's Librarian Annual Performance Evaluations as required for the evaluation portfolio (see Section III.B.4.b.ii). The Dean shall make the candidate's portfolio available for use by the Committee.
- iv. The chair of the Committee shall review the portfolio for completeness, and contact the candidate to check the materials added by the Dean, prior to review of the portfolio by the Committee.
- v. The chair of the Committee shall contact the references and assure them that all letters of reference shall be kept in confidence, to the extent permitted by law, so as to protect the privacy of the candidate and to encourage references to be frank and accurate in their descriptions of the candidate's strengths and weaknesses with regard to their qualifications for promotion or permanent status. All letters of reference shall be submitted to the chair of the Committee by September 15. The chair shall make all reasonable efforts to procure letters from the listed references. In the event that applicable letters are not received by the deadline of September 15, the Dean shall be advised of the situation and shall take appropriate action. Candidate review shall proceed without regard to number of references received. The letters of reference shall not be included in the evaluation portfolio but shall be forwarded under separate cover to each subsequent level of review.
- vi. September 15 is the final date for the candidate to add updated information regarding work that was completed prior to submission of the candidate's evaluation portfolio or to provide, if desired, any response to the Committee regarding applicable department chair/supervisor recommendations.

- vii. A candidate being considered for promotion or permanent status may withdraw from the review process at any time prior to submission of the summative portfolio to the Provost (see Section V.C). However, a candidate under mandatory consideration for promotion to Librarian II following the completion of the candidate's fourth year (or full-time equivalent), or a candidate under consideration for permanent status following the completion of the candidate's fifth year (or full-time equivalent), may not withdraw from the review process.
  - viii. If a librarian wishes to appeal a negative recommendation in the course of a promotion or permanent status review, the appeal must be submitted in accordance with appeals procedures (see Section V.B). However, an appeal shall not stay the evaluation process. In the event of a negative recommendation from both the Librarian Promotion and Permanent Status Committee and Dean, the evaluation portfolio shall not be forwarded to the next level of review unless the librarian proceeds with an appeal. The President's decision on promotion or permanent status shall be final and may not be appealed.
- d. September 15 – The Committee begins review of the portfolio for promotion or permanent status.
- i. The chair shall schedule a meeting for the Committee's deliberations. In the event that applicable department chair/supervisor letters of recommendation are not received by September 1 or letters of reference are not received by September 15, the Dean shall be advised of the situation and shall take appropriate action.
  - ii. The Committee's secretary shall take sufficient notes during all Committee deliberations so that reasons for a recommendation can be accurately expressed in writing.
- e. November 1 – The Committee completes its deliberations.
- i. The Committee shall reach a decision by secret ballot. Each voting Committee member shall date and identify an individual ballot with the Towson University ID number. Ballots shall be tallied by the Committee chair and secretary. No Committee member shall abstain from a vote for promotion or permanent status unless the member has been excluded according to policy or the Dean has authorized such abstention based on good cause, including an impermissible conflict of interest (see Section IV.B.9). In cases of such exclusion, authorized abstention,

indisposition, or absence of a regular member, the alternate shall participate in the vote to satisfy the quorum requirement (four votes). See Section IV.B.8 and IV.B.10 regarding appointment of temporary members to make a quorum).

- ii. A recommendation to grant promotion or permanent status requires a favorable vote by a simple majority of those present and eligible to vote. In the event of a tie vote, the chair shall reopen discussion, and, with the secretary, hold a second vote. A second vote ending in a tie shall result in a negative recommendation.
- iii. A ballot summary reporting on the overall vote results for each candidate shall be prepared by the chair and secretary and signed by Committee members to confirm their participation and acknowledge the result as recorded. The secret ballots shall be placed separately in a sealed envelope on which the Committee chair has entered the name of the candidate, name of library, the type of review, the review period, and the chair's name and signature.
- iv. The chair, working with the Committee, shall prepare a written, signed, dated recommendation, to be provided to the Dean, with a copy to the candidate and the department chair/supervisor, by November 1. The recommendation shall address the candidate's qualifications in librarianship, scholarship and professional leadership, and service, including any reservations on the part of the Committee. The recommendation shall include the Committee's vote count. The chair shall add the recommendation to the portfolio.
- v. The sealed secret ballots and ballot summary and letters from the candidate's designated references shall not be included in the portfolio, but shall be forwarded under separate cover to the Dean.
- f. November 1 – The Dean shall begin review of the portfolio for promotion or permanent status, having received the portfolio, the Committee's recommendation, the reference letters, the ballot summary, the sealed secret ballots, and the formal notes of the Committee.
- g. November 21 – All documentation must be included in the evaluation portfolio by no later than November 21. This may include any statement, evidence, or other documentation the candidate believes would present a more valid perspective of the candidate's performance,

in response to a department chair/supervisor and/or Committee recommendation, or as specifically requested by the Committee or Dean.

- h. December 15 – The Dean shall complete review of the portfolio and recommend granting or denying the request for promotion or permanent status, giving the reasons for that recommendation in writing. The Dean shall provide the written recommendation to the candidate, with a copy to the chair of Committee and department chair/supervisor, by December 15. The Dean shall add the recommendation to the portfolio.
- i. January 5 – The Dean and chair of the Committee shall assure that the candidate’s summative portfolio contains all required elements (see Section III.B.6). The Dean shall forward the candidate’s summative portfolio to the Provost by January 5. The Dean shall also forward, under separate cover, the reference letters, sealed ballots, and ballot summary to the Provost by January 5. The ballots and ballot summary shall be preserved by the Provost and then destroyed only after five (5) years following the separation of the candidate from employment at Towson University.

  - i. In the event of a negative recommendation from both the Librarian Promotion and Permanent Status Committee and Dean, the summative portfolio shall not be forwarded to the next level of review unless the librarian proceeds with an appeal (see Section V.B).
  - ii. The Provost may contact the Dean to request the full evaluation portfolio prior to making a recommendation.
- j. January 30 – The Provost shall complete review of the summative portfolio (and, if requested, the full evaluation portfolio) and recommend granting or denying the request for promotion or permanent status, giving the reasons for that recommendation in writing. The Provost shall provide the written recommendation to the candidate, with a copy to the President, Dean, Committee chair, and department chair/supervisor, by January 30.

  - i. If a librarian wishes to appeal a negative recommendation regarding promotion or permanent status (up to and including a recommendation from the Provost), the appeal must be submitted in accordance with the appeals procedures in Section V.B.
- k. March 15 – The President shall notify the candidate in writing of the decision to grant or deny promotion or permanent status by March 15, providing a copy of the decision to the Provost, Dean, Committee chair,

and department chair/supervisor. The President's decision on promotion or permanent status shall be final and may not be appealed.

1. July 1 – If granted, any promotion in rank or permanent status shall become effective July 1 of that calendar year.
    - i. If the rank of Librarian II is not granted by the completion of the fifth year of service (or full-time equivalent), the candidate shall be granted an additional and terminal one-year appointment and, barring exceptional circumstances, shall receive no further consideration for the rank of Librarian II (see Section III.D.5.viii and III.D.5.ix). Any such librarian termination shall be in accordance with policies applicable to tenure-track faculty.
    - ii. If permanent status is not granted by the completion of the sixth year of service (or full-time equivalent), the candidate shall be granted an additional and terminal one-year appointment and, barring exceptional circumstances, shall receive no further consideration for permanent status (see Section III.D.6.h and III.D.6.i). Any such librarian termination shall be in accordance with policies applicable to tenure-track faculty.
  - m. In the event that the Committee, the Dean, or the Provost implementing these procedures anticipates that despite their reasonable efforts they will be unable to meet a deadline provided herein, they shall promptly identify a date certain by which they expect to complete the work associated with the deadline. They shall then notify the candidate in writing of the schedule change and provide copies of the notification to the Committee chair, the Dean, and the Provost. A copy of the notification shall be added to the portfolio by the current reviewer, in the Recommendations section.
  - n. At whatever point the promotion or permanent status review is concluded, the portfolio shall be retained in its entirety by the Dean and then destroyed only after five (5) years following the separation of the candidate from employment at Towson University. The portfolio shall be kept in a separate secure location in the Dean's office apart from the candidate's personnel file.
5. Promotional Review Timetable
- a. Promotion from Librarian I to Librarian II
    - i. Promotional review is mandatory for a librarian at the rank of Librarian I and ordinarily begins after three (3) years of full-time professional experience (or full-time equivalent). However, a

librarian shall not be eligible for promotion until the librarian has also served at least twelve (12) continuous months (or the full-time equivalent) in a professional, permanent status-track position at Towson University.

- ii. A librarian who has completed a four continuous years of full-time service (or full-time equivalent; see example in Section I.D.4) as a Librarian I at Towson University must initiate a mandatory promotional review. To be considered for promotion, the librarian must initiate the review process through submission of a letter of intent, and, subsequently, an evaluation portfolio to the Dean by the required dates (see Section III.D.4.b and III.D.4.c).
- iii. For full criteria, see Section II.C.2. For applicability of criteria, see Section II.A.7.
- iv. Promotion to Librarian II, if granted, shall become effective July 1 of that calendar year.
- v. A librarian may appeal a negative recommendation, following appeals procedures (see Section V.B).
- vi. A librarian applying for promotion to Librarian II may withdraw from the review process at any point prior to submission of the summative portfolio to the Provost (see Section V.C). However, a librarian under mandatory consideration for promotion to Librarian II following the completion of the librarian's fourth year (or full-time equivalent) may not withdraw from the review process.
- vii. In the event that a librarian withdraws from the review process or is denied promotion to Librarian II, the librarian may reapply in subsequent review cycles, up to and including the beginning of the fifth continuous year (or full-time equivalent) at Towson University.
- viii. The total number of annual appointments for a full-time librarian with the rank of Librarian I shall not exceed five (5). Annual appointments shall begin July 1. An initial partial year of ten (10) months or more, i.e., beginning July 2 through September 1 and ending June 30, shall be considered a librarian's first annual appointment. The total number of annual appointments for a part-time librarian shall be based upon percentage of employment; for example, the total number of annual appointments for a half-time (50%) librarian shall not exceed eleven (11).

- ix. If promotion from Librarian I to Librarian II is denied by the completion of a librarian's fifth continuous year of full-time employment (or full-time equivalent employment) at Towson University, the librarian shall be granted an additional and terminal one-year appointment and, barring exceptional circumstances, shall receive no further consideration for the rank of Librarian II. Termination shall be in accordance with policies applicable to tenure-track faculty.
- b. Promotion from Librarian II to Librarian III
- i. Promotional review is neither mandatory nor automatic for a librarian at the rank of Librarian II. To be considered for promotion, a librarian must initiate the review process through submission of a letter of intent, and, subsequently, an evaluation portfolio to the Dean by the required dates (see Section III.D.4.b and III.D.4.c).
  - ii. Review for promotion to Librarian III ordinarily begins after at least six (6) years of professional experience, three (3) of which must be at, or comparable to, the level of Librarian II at Towson University. However, a librarian shall not be eligible for promotion until the librarian has also served at least twelve (12) continuous months in a professional, permanent status-track position at Towson University. For full criteria and full-time equivalency for part-time librarians, see Section II.C.3. For applicability of criteria, see Section II.A.7.
  - iii. Promotion to Librarian III, if granted, shall become effective July 1 of that calendar year.
  - iv. A librarian may appeal a negative recommendation, following appeals procedures (see Section V.B).
  - v. If a librarian is denied promotion to Librarian III, the librarian shall not be reviewed for promotion in the next review cycle.
  - vi. A librarian applying for promotion to Librarian III may withdraw from the review process at any point prior to submission of the summative portfolio to the Provost (see Section V.C).
  - vii. A librarian who has withdrawn from promotional review for Librarian III may reapply in the next review cycle.

- c. Promotion from Librarian III to Librarian IV
  - i. Promotional review is neither mandatory nor automatic for a librarian at the rank of Librarian III. To be considered for promotion, a librarian must initiate the review process through submission of a letter of intent and, subsequently, an evaluation portfolio to the Dean by the required dates (see Section III.D.4.b and III.D.4.c).
  - ii. Review for promotion to Librarian IV ordinarily begins after at least nine (9) years of professional experience, three (3) of which must be at, or comparable to, the level of Librarian III at Towson University. However, a librarian shall not be eligible for promotion until the librarian has also served at least twelve (12) continuous months in a professional, permanent status-track position at Towson University. For full criteria and full-time equivalency for part-time librarians, see Section II.C.4. For applicability of criteria, see Section II.A.7.
  - iii. Promotion to Librarian IV, if granted, shall become effective July 1 of that calendar year.
  - iv. A librarian may appeal a negative recommendation, following appeals procedures (see Section V.B).
  - v. If a librarian is denied promotion to Librarian IV, the librarian shall not be reviewed for promotion in the next review cycle.
  - vi. A librarian applying for promotion to Librarian IV may withdraw from the review process at any point prior to submission of the summative portfolio to the Provost (see Section V.C).
  - vii. A librarian who has withdrawn from promotional review for Librarian IV may reapply in the next review cycle.
- d. Early or Extended Promotional Review

See Section II.A.5 and II.A.6 for policies on early and extended promotional review.

## 6. Permanent Status Review Timetable

- a. A librarian must hold the rank of Librarian II or higher in order to apply for permanent status. A librarian at the rank of Librarian II must apply for permanent status by no later than the beginning of the sixth year of continuous service (or full-time equivalent; see example in Section

I.D.5) as a permanent status-track librarian at Towson University. A minimum of twenty-four (24) continuous months must be at Towson University. For full criteria, see Section II.D. For applicability of criteria, see Section II.A.7.

- b. To be considered for permanent status, a librarian must initiate the review process through submission of a letter of intent and, subsequently, an evaluation portfolio to the Dean by the required dates (see Section III.D.4.b and III.D.4.c).
- c. Permanent status, if granted, shall become effective July 1 of that calendar year.
- d. A librarian may appeal a negative recommendation, following appeals procedures (see Section V.B).
- e. A librarian applying for permanent status may withdraw from the review process at any point prior to submission of the summative portfolio to the Provost (see Section V.C). A librarian under mandatory consideration for permanent status following the completion of the librarian's fifth year (or full-time equivalent) may not withdraw from the review process.
- f. If a librarian withdraws from the permanent status review process prior to the mandatory review year, the librarian may not reapply until after the completion of the librarian's fifth year of service (or full-time equivalent).
- g. However, a librarian denied permanent status at any time may not reapply.
- h. The total number of annual appointments for a full-time librarian who has been appointed at or promoted to a rank of Librarian II or higher shall not exceed six (6). Annual appointments shall begin July 1. An initial partial year of ten (10) months or more, i.e., beginning July 2 through September 1 and ending June 30, shall be considered a librarian's first annual appointment. The total number of annual appointments for a part-time librarian shall be based upon percentage of employment; for example, the total number of annual appointments for a half-time (50%) librarian who has been appointed or promoted to a rank of Librarian II or higher shall not exceed twelve (12).
- i. If a librarian is denied the request for permanent status by the completion of the sixth continuous year of full-time employment (or full-time equivalent), the librarian shall be granted an additional and terminal one-year appointment and shall receive no further

consideration for permanent status, barring a successful appeal (see Section V.B). Termination shall be in accordance with policies applicable to tenure-track faculty.

j. Early or Extended Permanent Status Review

See Section II.A.5 and II.A.6 for policies on early and extended permanent status review.

**IV. LIBRARIAN PROMOTION AND PERMANENT STATUS COMMITTEE AND DEVELOPMENT OF LIBRARIAN PROMOTION, PERMANENT STATUS, REAPPOINTMENT, AND MERIT POLICIES AND PROCEDURES**

**A. Duties**

1. The Librarian Promotion and Permanent Status Committee (“Committee”) shall assess the qualifications of each candidate as guided by the criteria defined herein (see Section II) or as otherwise applicable (see Section II.A.7). The Committee shall conduct an objective and thorough evaluation of each candidate’s qualifications for promotion or permanent status. Based on this evaluation, the Committee shall prepare a recommendation, which is provided to the Dean and copied to the candidate and department chair/supervisor.
2. The Librarian Promotion and Permanent Status Committee also shall develop and recommend to the Academic Senate policies, procedures, standards, and criteria, relating to all aspects of librarian evaluation, including annual review (includes merit), reappointment, promotion, and permanent status (“PPSRM policies and procedures”).
3. Members of the Committee must regard candidate reviews to be of the utmost confidentiality. Any discussion of review matters that come before the Committee with anyone not on the Committee, or discussions of these matters in public areas or in unofficial meetings, is inappropriate, except to the extent such disclosure is required by law or by applicable policy. Any and all such behavior shall be regarded as a serious breach of confidentiality and shall be subject to disciplinary action.

**B. Committee Structure, Membership, and Participation**

1. The Committee is a standing committee, which consists of five librarians, including four regular members (including any substitute for a regular member) and one alternate member. The term of service for regular Committee members is three (3) years. Regular members serve staggered terms to preserve continuity from one year to the next. The alternate serves a

one-year term. Should a regular member become temporarily ineligible (see item 3 below) in the course of serving a term, a substitute for the ineligible regular member shall be elected for a one-year term, upon the conclusion of which the regular member shall return to serve the remainder of the term.

2. A librarian must hold permanent status in order to be eligible to serve on the Committee.
3. The Dean is ineligible to serve on the Committee. A librarian who is applying for promotion is ineligible to serve during the year in which any decision relative to the librarian's review is undertaken. Following the completion of a regular, alternate, or substitute term on the Committee, a librarian is ineligible to serve for a period of one (1) year. If the number of eligible librarians is insufficient to fill vacant seats, an exception to Committee membership eligibility may be made by the Dean.
4. Permanent status and permanent status-track librarians at the Towson University Libraries shall elect Committee members from a slate of all eligible librarians, taking into account any Librarian III and Librarian IV candidacies confirmed by the letters of intent due by June 15. This election must be initiated annually between June 16 and June 30. The election shall be conducted by the chair of the Committee, who shall promptly notify the Dean of the election results. The new Committee shall convene no later than August 15.
5. In the event of a tie for any vacant position, the chair shall conduct a runoff election.
6. In the event of a vacancy occurring after the annual election, prior to or during candidate review, a new member shall be selected according to the next highest number of votes received in that year's initial election. In the event of a tie for the next highest number of votes, the Committee shall conduct a runoff election to fill the vacancy.
7. A chair and a secretary are elected for a one-year term by the Committee from its members. The chair shall have at least one year's previous experience on the Committee and must hold permanent status. The Dean shall be promptly notified of the election results for chair and secretary.
8. Since the alternate member may be required to take the place of an indisposed or excluded member at any time, the alternate shall attend all Committee meetings. A quorum shall consist of four Committee members: the four regular members (including any substitute for a regular member), or, when necessary, three regular members (including applicable substitutes) and the alternate. See items 9 and 10 below for conditions of exclusion and the appointment of temporary members to satisfy quorum requirements.

9. Under the following circumstances, a Committee member must be excluded from review of an individual candidate. No Committee member may be present at or participate in discussion or vote on the review of: 1) a candidate under the Committee member's direct supervision, or a candidate for whom the Committee member has submitted a recommendation in the capacity of prior department chair/supervisor (see Section III.B.4.b.iv); 2) the Committee member's own portfolio; 3) the Committee member's current direct supervisor; 4) the Committee member's spouse or any other individual in regard to whom the member may have a clearly defined conflict of interest, e.g., a candidate who shares the same household or has common financial interests with the member, as identified by the chair of the Committee. Should the Committee have questions concerning the participation or exclusion of a member in regard to any candidate, the Dean shall be responsible for deciding whether the member of the Committee should be excluded from attending or participating in discussion and voting during candidate review.
  
10. Should the number of participating members fall below the quorum for any candidate (as discussed above in item 8), the Committee shall complete the quorum of four by selecting the necessary number of eligible librarians who have received the next highest number of votes in the most recent election. In the event that this is not possible, the Dean has the discretion to appoint one or more temporary members to the Committee should the number of participating members fall below the mandated quorum. Appointed members shall attend, participate in discussion, and vote only in regard to candidates for which their votes are required to make a quorum.

#### C. Committee Officers

1. The chair shall be elected from the members of the Committee at the Committee's initial meeting after its annual general election in June.
  - a. Qualifications: election to Committee as a regular member (or as a substitute for a regular member), permanent status, and one (1) year of experience on the Committee.
  - b. Term of office: one (1) year. The chair may be re-elected for a second consecutive term.
  - c. Duties:
    - i. Convene and conduct meetings as necessary.
    - ii. Initiate elections for Committee membership, including distributing, and with the secretary, counting ballots (or electronic equivalent) and announcing election results.

- iii. Keep a calendar that records the initial appointment, rank, status, eligibility, and applicable mandatory timelines for permanent status and promotional reviews for each librarian. Annually, forward updated calendar to Dean by May 1.
  - iv. Maintain the records of the business of the Committee.
  - v. Act as contact for the Dean and librarians regarding promotion or permanent status matters.
  - vi. Perform specified tasks and oversee promotion and permanent status review sequence.
  - vii. Vote on candidates' promotion or permanent status.
  - viii. With the secretary, count ballots of any Committee vote taken.
  - ix. With the secretary, prepare and forward to the Dean sealed secret ballots and ballot summary for each promotion or permanent status candidate.
  - x. With the Committee, write a recommendation for each promotion or permanent status candidate, to be forwarded to the candidate and copied to the Dean and department chair/supervisor.
  - xi. Forward in writing any Committee recommendations on policies or procedures to the Dean.
  - xii. Coordinate review and revision of PPSRM policies and procedures (see Section IV.D).
2. The secretary of the Committee shall be elected from the members of the Committee at the Committee's initial meeting after its annual general election in June.
- a. Qualifications: election to Committee as a regular member (or as a substitute for a regular member) and permanent status.
  - b. Term of office: one (1) year. The secretary may be re-elected for a second consecutive term.
  - c. Duties:
    - i. Record the minutes of the Committee's meetings and distribute them to all its members.

- ii. Record Committee review deliberations in sufficient detail that reasons for recommendations may be clearly understood.
- iii. Vote on candidates' promotion or permanent status.
- iv. With the chair, count ballots of any Committee vote taken.
- v. With the chair, prepare and forward to the Dean sealed secret ballots and ballot summary for each promotion or permanent status candidate.

#### **D. Development of PPSRM Policies and Procedures**

1. The Librarian Promotion and Permanent Status Committee shall develop and recommend to the Academic Senate policies, procedures, standards, and criteria relating to all aspects of librarian evaluation, including annual review (includes merit), reappointment, promotion, and permanent status at Towson University ("PPSRM policies and procedures"). PPSRM policies and procedures shall be developed in consultation with the Dean and librarians. PPSRM policies and procedures must include clear criteria for evaluation that do not conflict with those established by the University or USM. PPSRM policies and procedures are set forth in Appendix 2 of the Towson University Policy on Appointment, Rank and Tenure of Faculty ("PPSRM document").
2. The PPSRM document with proposed revisions must be distributed to all permanent status and permanent status-track librarians at least fourteen (14) calendar days prior to a vote on the document. Final librarian approval shall be by a simple majority vote of permanent status and permanent status-track librarians. Excepting librarians who are on leave from the University, the signature of each permanent status or permanent status-track librarian shall signify that the librarian has voted on the revised PPSRM document. The revised PPSRM document shall be reviewed for approval by the Dean. Once approved, the Dean shall be responsible for transmitting the document including the revised policies and procedures, with Approval Form, to the University Counsel in a timely fashion. The University Counsel may forward the PPSRM document to the Office of the Attorney General for additional review and comment.
3. The Librarian Promotion and Permanent Status Committee shall formally respond to proposed changes and/or recommendations resulting from PPSRM document review by the University Counsel and/or Office of the Attorney General. Any substantive proposed changes and recommendations shall be submitted in the form of a revised PPSRM document for discussion at least fourteen (14) calendar days prior to a vote by permanent status-track and permanent status librarians. Once approved, the Committee shall submit a revised copy of the PPSRM document, with Approval Form, to the Dean

for approval. Once approved, the Dean shall be responsible for transmitting the PPSRM document including the revised policies and procedures, with Approval Form, to the Academic Senate in a timely fashion.

4. The Librarian Promotion and Permanent Status Committee shall formally respond to proposed changes and/or recommendations resulting from the review by the Academic Senate. Any substantive proposed changes and recommendations shall be submitted in the form of a revised PPSRM document for discussion at least fourteen (14) calendar days prior to a vote by permanent status-track and permanent status librarians. Once approved, the Committee shall submit a revised copy of the PPSRM document to the Dean for approval prior to the due date specified by the Academic Senate.
5. Upon approval by the Academic Senate, the revised PPSRM document shall be sent to the Provost, University Counsel, President, and the Office of the Attorney General for review and approval. If approved, a copy of the revised PPSRM document shall be filed in the Office of the Chancellor, and shall replace the existing PPSRM policies and procedures.
6. The Librarian Promotion and Permanent Status Committee must coordinate review of the PPSRM policies and procedures every three (3) years. To conduct this review, the Committee shall compile comments from librarians regarding any further development and/or revision of the existing PPSRM policies and procedures and PPSRM document, and report these findings to the Dean and librarians. Review may occur at other times, as warranted by special and/or exigent circumstances or by the Towson University ART revision schedule.
7. All PPSRM policies and procedures relating to librarian evaluation, including annual review (includes merit), reappointment, promotion, and permanent status, shall remain in effect until changed according to the procedures described herein. For applicability of standards and criteria for promotion or permanent status reviews, see Section II.A.7.

**V. APPEALS, NEGATIVE RECOMMENDATIONS, AND WITHDRAWAL FROM EVALUATION****A. Negative Recommendations**

1. A negative recommendation at any level regarding annual review (i.e., a rating of “unsatisfactory – needs improvement”; includes merit), reappointment, promotion, or permanent status shall be delivered in writing in person or sent by certified mail to the librarian’s last known address, return receipt requested, and postmarked no later than the date on which the recommendation is to be distributed to the librarian according to the calendars for annual evaluation (see Section III.D.2) and promotion and permanent status (see Section III.D.4).
2. The department chair/supervisor has responsibility for conveying any recommendation made at the department level. The chair of the Librarian Promotion and Permanent Status Committee (“Committee”) has responsibility for conveying any recommendation made at the Committee level. The Dean has responsibility for conveying any recommendation made at the Dean level. The Provost has responsibility for conveying any recommendation or decision rendered by the Provost. The President has responsibility for conveying any decision rendered by the President.

**B. Appeals**

1. Appeals of negative recommendations for annual review (includes merit), reappointment, promotion, or permanent status may be made at any point in the process, following the procedures outlined below; however, an appeal shall not stay the evaluation process.
2. All appeals shall be made in writing and delivered to the designated person within twenty-one (21) calendar days from the date the negative recommendation is delivered in writing in person or the date of the postmark of the certified letter that conveys the negative recommendation.
3. All material placed in the portfolio, including materials in support of the appeal, shall become a part of the cumulative expansion of the portfolio and shall not be removed by subsequent levels of evaluators. The portfolio under review, with additions, shall be forwarded to the next level by the appropriate reviewing entity.
4. Within twenty-one (21) calendar days of receipt of a formal appeal with attached materials, the recipient of the appeal (i.e., the Dean, the Provost, or the President) shall review the case and provide a written response.

5. The next higher level shall serve as the appeals body. For annual review (includes merit), the levels of evaluation are the department chair/supervisor, the Dean, and the Provost. For reappointment, the levels of evaluation are the department chair/supervisor, the Dean, the Provost, and the President. For promotion or permanent status, the levels of evaluation are the Committee, the Dean, the Provost, and the President.
6. There are three types of appeals: substantive, procedural, and unlawful discrimination.
  - a. Substantive appeals refer to perceived errors in judgment made by the department chair/supervisor, the Committee, the Dean, or the Provost with regard to the evaluation of the librarian's performance.
    - i. The appeal must clearly state the grounds for appeal. The appeal must be accompanied by supporting documents, such as any additional statement, evidence, or other documentation the librarian believes would present a more valid perspective on the librarian's performance.
    - ii. Appeals of department chair/supervisor recommendations concerning annual review (includes merit) or reappointment shall be addressed to the Dean and copied to the department chair/supervisor. Appeals of Committee recommendations on promotion or permanent status shall be addressed to the Dean and copied to the Committee chair and department chair/supervisor. Appeals of the Dean's recommendations concerning annual review (includes merit) or reappointment shall be addressed to the Provost and copied to the Dean and department chair/supervisor. Appeals of the Dean's recommendations on promotion or permanent status shall be addressed to the Provost and copied to the Dean, Committee chair, and department chair/supervisor. Appeals of the Provost's recommendations on reappointment shall be addressed to the President and copied to the Provost, Dean, and department chair/supervisor. Appeals of the Provost's recommendations on promotion or permanent status shall be addressed to the President and copied to the Provost, Dean, Committee chair, and department chair/supervisor.
    - iii. Within twenty-one (21) calendar days of receipt of a formal appeal with attached materials, the recipient of the appeal shall review the case and provide a written response to the librarian regarding the substantive appeal. Copies of this letter shall be provided to all parties who were copied on the original appeal letter.

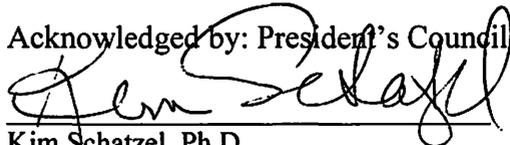
- b. Procedural appeals relate to alleged errors in the procedures followed in the review, recommendation and notification process, and shall follow the procedures below.
  - i. The appeal must clearly state the alleged procedural error(s) and shall be accompanied by supporting documents.
  - ii. Appeals of department chair/supervisor recommendations concerning annual review (includes merit) or reappointment shall be addressed to the Dean and copied to the department chair/supervisor. Appeals of Committee recommendations on promotion or permanent status shall be addressed to the Dean and copied to the Committee chair and department chair/supervisor. Appeals of the Dean's recommendations concerning annual review (includes merit) or reappointment shall be addressed to the Provost and copied to the Dean and department chair/supervisor. Appeals of the Dean's recommendations on promotion or permanent status shall be addressed to the Provost and copied to the Dean, Committee chair, and department chair/supervisor. Appeals of the Provost's recommendations on reappointment shall be addressed to the President and copied to the Provost, Dean, and department chair/supervisor. Appeals of the Provost's recommendations on promotion or permanent status shall be addressed to the President and copied to the Provost, Dean, Committee chair, and department chair/supervisor.
  - iii. Within twenty-one (21) calendar days of receipt of a formal appeal with attached materials, the recipient of the appeal shall review the case and provide a written response to the librarian regarding the procedural appeal. Copies of this letter shall be provided to all parties who were copied on the original appeal letter.
- c. Appeals alleging unlawful discrimination in race, color, religion, age, national origin, gender, sexual orientation or disability must follow the specific procedures described in Towson University policy 06-01.00, "Prohibiting Discrimination on the Basis of Race, Color, Religion, Age, National Origin, Sex and Disability."
- d. The Provost's decision on annual review (includes merit) shall be final and may not be appealed. The President's decision on reappointment, promotion or permanent status shall be final and may not be appealed.

**C. Withdrawal from Promotion or Permanent Status Evaluation**

1. A librarian being considered for promotion or permanent status may withdraw from the review process at any time prior to submission of the summative portfolio to the Provost. However, a librarian under mandatory consideration for promotion to Librarian II following the completion of the librarian's fourth year, or a librarian under mandatory consideration for permanent status following the completion of a fifth year, may not withdraw from the review process. A part-time librarian may not withdraw during the corresponding full-time equivalent years. For example, a half-time (50%) librarian under mandatory consideration for promotion to Librarian II following the completion of the librarian's eleventh year may not withdraw from the review process; likewise, a half-time (50%) librarian under mandatory consideration for permanent status following the completion of the librarian's twelfth year may not withdraw from the review process.
2. A withdrawal must be submitted in writing. A withdrawal prior to submission of the evaluation portfolio shall be addressed to the Dean and copied to the chair of the Librarian Promotion and Permanent Status Committee and department chair/supervisor. A withdrawal during review by the Committee shall be addressed to the Committee chair and copied to the Dean and department chair/supervisor. A withdrawal during review by the Dean shall be addressed to the Dean and copied to the Committee chair and department chair/supervisor.
3. If a librarian withdraws an application, the librarian's evaluation portfolio shall not be forwarded to the next level of review, but shall be returned to the librarian.
4. A librarian who has withdrawn from review for promotion to Librarian II prior to the mandatory review year may reapply in subsequent review cycles, up to and including the mandatory review year.
5. A librarian who has withdrawn from review for permanent status prior to the mandatory review year may reapply for permanent status, but the next review shall not occur until the mandatory review year.
6. A librarian who has withdrawn from review for promotion to Librarian III or Librarian IV may reapply in the next review cycle.

Approval date: 4/17/2019

Acknowledged by: President's Council



Kim Schatzel, Ph.D.  
President

Date

5/16/19

**VI. INTERIM REVIEW AND ANNUAL PERFORMANCE EVALUATION FORMS**

**LIBRARIAN INTERIM REVIEW**

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**REVIEW PERIOD**

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**NAME**

---

**TITLE**

---

**DEPARTMENT**

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**DATE SUBMITTED**

**PART I  
GOALS & PROFESSIONAL DEVELOPMENT PLAN  
REPORT ON RESULTS FOR INTERIM REVIEW PERIOD**

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<b>Name</b>	<b>Department</b>	<b>Review Period</b>
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**GOAL:**

**RESULTS:**

**GOAL:**

**RESULTS:**

**GOAL:**

**RESULTS:**

**Additional Comments (*optional*):**

**Reflective Statement:**

**PART II**  
**GOALS (OR REVISED GOALS) FOR NEXT REVIEW PERIOD**

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<b>Name</b>	<b>Department</b>	<b>Review Period</b>
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**GOAL:**

**GOAL:**

**GOAL:**

**GOAL:**

**GOAL:**

**GOAL:**

**PART III**  
**PROFESSIONAL ACTIVITIES REVIEW NARRATIVE**  
**FOR INTERIM REVIEW PERIOD**

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Name	Department	Review Period
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**Overall Rating:** \_\_\_\_\_  
(1) Needs Improvement

(2) Meets Expectations

**Department Chair/Supervisor Narrative:**

**Librarian Comments (*optional*):**

**SIGNATURES:**

Librarian: \_\_\_\_\_ Date: \_\_\_\_\_

Department Chair/Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

Dean of University Libraries: \_\_\_\_\_ Date: \_\_\_\_\_

**LIBRARIAN ANNUAL  
PERFORMANCE EVALUATION**

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**REVIEW PERIOD**

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**NAME**

---

**TITLE**

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**DEPARTMENT**

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**DATE SUBMITTED**

**PART I**  
**ANNUAL PROFESSIONAL ACTIVITY REPORT**

<b>Name</b>	<b>Department</b>	<b>Review Period</b>
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This form, completed annually by each librarian of the Towson University Libraries, is a report on activities related to annual performance review, promotion and permanent status. Under the appropriate headings, please provide information relating to your activities for the time period specified above.

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**LIBRARIANSHIP – PRIMARY RESPONSIBILITIES**

*(Activities and accomplishments related to primary job responsibilities. For example, archives & special collections; web services; research & instruction; and/or special projects or assignments.)*

**Librarianship Reflection (maximum 500 words):**

(Instruction librarians should incorporate a reflection on teaching practices in this reflection.)

*If applicable, instruction librarians will attach Instruction Observation Form as an addendum to LAPE, according to the Towson University Libraries observation guidelines.*

     CHECK if Instruction Observation Form attached

**SCHOLARSHIP, RESEARCH, PUBLICATIONS, CREATIVE WORKS, AND PROFESSIONAL LEADERSHIP**

*(Publications; presentations; course work; grant proposals; professional and scholarly organization offices, committee work, or memberships; and/or other scholarly activities related to position.)*

**SERVICE**

*(Approved committee work for the Towson University Libraries, Towson University, USMAI or non-library related organizations; classroom teaching outside of primary responsibilities.)*

**PART II**  
**MAJOR GOALS & PROFESSIONAL DEVELOPMENT PLAN**  
**REPORT ON RESULTS FOR CURRENT REVIEW PERIOD**

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<b>Name</b>	<b>Department</b>	<b>Review Period</b>
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**GOAL:**

**RESULTS:**

**GOAL:**

**RESULTS:**

**GOAL:**

**RESULTS:**

**GOAL:**

**RESULTS:**

**GOAL:**

**RESULTS:**

**Additional Comments (*optional*):**

**PART III**  
**MAJOR GOALS & PROFESSIONAL DEVELOPMENT PLAN**  
**FOR NEXT REVIEW PERIOD**

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<b>Name</b>	<b>Department</b>	<b>Review Period</b>
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**GOAL:**

**GOAL:**

**GOAL:**

**GOAL:**

**GOAL:**

**PART IV**  
**PERFORMANCE EVALUATION NARRATIVE**  
**FOR CURRENT REVIEW PERIOD**

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<b>Name</b>	<b>Department</b>	<b>Review Period</b>
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**Overall Rating:** \_\_\_\_\_  
(1) Needs Improvement      (2) Meets Expectations      (3) Outstanding

**Department Chair/Supervisor Narrative:**

**Librarian Comments (*optional*):**

**SIGNATURES:**

Librarian: \_\_\_\_\_ Date: \_\_\_\_\_

Department Chair/Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

Dean of University Libraries: \_\_\_\_\_ Date: \_\_\_\_\_