

**Criteria for Promotion of  
Associates of the Faculty at  
University of Texas  
at Arlington Libraries**

by

The Associates of the Faculty Promotion Policy Task Force

Approved by Associates of the Faculty of the UTA Libraries on

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Version 1.1, Effective January 1, 2017

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## Contents

Foreword.....	3
Version Notes.....	4
Introduction.....	5
Defining Excellence.....	7
Librarianship or Archival Work.....	7
Evidence of Excellence.....	7
Scholarship, Research, or Creative Achievements .....	9
Evidence of Excellence.....	9
Service .....	10
Evidence of Excellence.....	11
The Promotion Process .....	11
Expectations of Performance: Promotion from Assistant Librarian/Archivist to Associate Librarian/Archivist and to Senior Librarian/Archivist.....	12
Annual Reviews and the Promotion Process: Expectations of Supervisors.....	13
Informal and/or Formal Mentoring.....	13
Promotion Timelines and Processes .....	14
Assistant Librarian/Archivist to Associate Librarian/Archivist.....	14
Associate Librarian/Archivist to Senior Librarian/Archivist.....	15
Appeals .....	16
Early Application for Promotion.....	17
Composition of the AFPRC .....	17
Process for Evaluating Dossiers.....	18
Documentation for Candidates for Promotion .....	19
References.....	21
Appendix A: Examples of Scholarly Materials or Activities.....	22
Appendix B: Guidelines for Completing Categories in the UTA Online Profile System.....	26

## Foreword

Work on this policy began in March 2013 when Dean Rebecca Bichel selected the members of the Associates of the Faculty Promotion Policy Task Force and gave us a charge to craft a new promotion policy for the UTA Libraries' associates of the faculty. The former policy was useful in its time but had become outdated and was perceived by some as too subjective or unclear in its guidelines for promotion. Dean Bichel charged the task force to develop a completely new and different promotion process that would be progressive, with language that would relate to true mastery at the senior level. She wanted to ensure that it would address skills, knowledge, and expertise at job functions; professional engagement (including scholarship and national, regional, state, and local service); and successful collaboration and collegiality within the organization. The dean asked the task force to encourage new modes and models of scholarship that contribute to the profession in substantive ways. We worked through the process of crafting this new policy for three years, performing research regarding policies at peer and aspirational institutions, writing and revising the policy over dozens of iterations (we collaborated with Dean Bichel on revisions in the later stages to ensure that we had met her charge), and finally submitting it to a vote by the associates of the faculty, who approved the policy on February 8, 2016. Voting results were as follows:

- In favor of adopting the new policy: 22 (65%)
- Opposed to adopting the new policy: 12 (35%)
- Total number voting: 34 individuals out of 44 eligible to vote

Thus, this policy became official at that time. It is labeled Version 1.0 since we foresee the need for revisions in the future. When changes are necessary, version numbers should be amended and dated on the title page of the policy, and a brief description of the changes should be added to the Version Notes on page 4 so that a record of the policy's history may be preserved.

We gratefully acknowledge the assistance of two former task force members: Clint Chamberlain and Boglarka Huddleston. Additionally, we are indebted to the authors of the *Library Criteria for the Promotion and Tenure of Faculty Librarians* at Coates Library, Trinity University (2012). We asked for and received permission from them to use their policy document as a starting point for ours. Although we have made numerous changes from those early stages to this final version, having a springboard to guide our work, especially at the beginning, was invaluable.

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## Version Notes

Version 1.0: This first version of the policy was voted on and approved by associates of the faculty on February 8, 2016.

Version 1.1: Per instructions from Dean Rebecca Bichel and Provost Linda Johnsrud, the timeline of the promotion process was shifted to allow promotions to become effective the first day of the fiscal year, September 1. The effective date of this version of the policy is January 1, 2017.

## Introduction

This document outlines the promotion policy for University of Texas at Arlington Libraries' associates of the faculty, which includes those personnel categorized as librarians or archivists. The policy applies to any individual within University Libraries who holds a position characterized as an associate of the faculty, regardless of the academic degree she or he holds. Within the scope of this document, *promotion* is defined as a change in rank from assistant to associate librarian/archivist or from associate to senior librarian/archivist. This document does not encompass policy for promotion in terms of title, for example, from liaison librarian to department head. Its purpose is to assist and guide librarians and archivists as they engage in the process of furthering their professional careers at UT Arlington Libraries. The authors of this document have made an effort to embody the core values of the UT Arlington Libraries throughout the policy-making process and hope that they are reflected in this document. These values are as follows:

- Community
- Learning, discovery, and knowledge creation
- Excellence
- Risk taking and innovation
- Transparency of communication and integrity of action
- Service
- Collaboration
- Flexibility

Furthermore, UT Arlington Libraries operates in accordance with the Rules and Regulations of the Board of Regents of The University of Texas System:

The University of Texas System Administration is an equal employment opportunity employer and does not discriminate against applicants or employees on the basis of race, color, national origin, religion, gender, age, disability, veteran status, or sexual orientation. System Administration is committed to ensuring that all aspects of employment, including recruitment, promotion, compensation, benefits, and training, are based on equal employment opportunity principles. (McRaven, 2015)

For librarians and archivists at UT Arlington Libraries, application for promotion from assistant to associate librarian/archivist or from associate to senior librarian/archivist **is strongly encouraged but optional**. Because this process is optional, this document will contain information for those who choose to apply for promotion (Track 1). Because we highly value scholarship and service contributions to the profession, supervisors will consider and discuss these contributions during the annual performance review process for all associates of the faculty. Supervisors are encouraged to use the expectations for service and scholarship outlined in this document as they evaluate associates of the faculty who report to them. For individuals on Track 1, the application process is outlined in detail below. So that Libraries' Administration may make informed decisions regarding the budget, **all associates of the faculty must notify their supervisor of their selection of Track 1 or 2 in writing and send a copy to the chair of the Associates of the Faculty Promotion Recommendation Committee (AFPRC). The AFPRC chair will send a complete list of associates of the faculty track declarations and a list of those who intend to apply for promotion along with the letters of intent to Libraries**

**Administration by January 15 of each year.** Libraries Administration will be responsible for official records of which associates of the faculty are on which track. Libraries Administration will also maintain the Libraries' list of each associate of the faculty along with the following information: his or her rank, month and year of hire as an associate of the faculty, and date(s) of promotion to associate or senior librarian (as applicable). This list should be saved as a new version each time it is updated so that the Libraries will have a historical record of all associates of the faculty and their respective ranks and tracks.

One incentive for individuals to pursue Track 1 is salary advancement (covered in detail in Promotion Timelines and Processes on page 14). An additional incentive is that those on Track 1 will have access to a guaranteed annual amount of travel and training funds to support their professional service, research, and scholarship (plus applicable incentives as outlined in the Travel and Training Policy). Those on Track 2 will not have funds set aside for them for travel and training; they will have to apply for funding and be considered on a case-by-case basis. The exact amount of travel and training funds for those on Track 1 will be decided on a yearly basis by members of Libraries Administration as they determine budgetary priorities. It will be the dean's responsibility to ensure that Track 1 associates of the faculty are informed of the travel and training funds available at the start of the fiscal year (September 1). If a given individual has been on Track 1 for eight years (as assistant to associate librarian or archivist) or six years (for associate to senior librarian or archivist) and has not actually applied for promotion, this incentive will be suspended, and the individual will be moved to Track 2. If, at some point in the future, this individual would like to return to Track 1, she or he should initiate a discussion with her or his supervisor and the dean of Libraries.

It is the role of supervisors and University Libraries Dean's Council to support and nurture librarians and archivists in their career progression at UT Arlington Libraries, and each supervisor–associate pair should work closely together to ensure a successful outcome for each candidate. For those librarians and archivists who are interested in pursuing Track 1, the process of applying for promotion should start with a meeting between them and their supervisor. Librarians and archivists should receive a great deal of input from their supervisors not only during annual performance evaluation meetings but also during ongoing formal and informal meetings throughout the year.

When the AFPRC is evaluating dossiers of associates of the faculty during the promotion process, the committee will examine the entire career history of each candidate. Scholarship and service activities that were accomplished years ago will be considered equal to recent accomplishments. It is important to note, however, that scholarship and service activities must be ongoing within five years previous to application for promotion; individuals who do not remain active will not advance to the next rank.

Also important to note is the fact that an individual's scholarly and service activities will be credited for any work done in the past no matter what degree or position the individual held at that time. However, these scholarly and service activities **must have been at a professional level** relevant to librarianship or archives work similar to or the same as what is described in the rubric as shown in the *Scoring Rubric with Examples* Excel file.

The document is divided into the three broad categories that encompass librarians and archivists' professional duties: librarianship or archival work; scholarship, research, or creative achievements; and service. Another crucial section of the policy is the rubric, located in an Excel

spreadsheet file titled *Scoring Rubric with Examples*, which contains information that will guide the AFPRC in evaluating candidates' promotion dossiers. It is also meant to help candidates self-evaluate their own dossiers before submission.

## Defining Excellence

### Librarianship or Archival Work

Within the context of a librarian's or archivist's evaluation, *librarianship or archival work* shall be considered that body of work that constitutes the primary roles for which the individual was hired. Typically, the elements that constitute librarianship or archival work for an individual will differ based on the particular position and its library department. For a liaison librarian, for instance, librarianship would normally encompass activities in scholarly communication services, instruction, outreach, and community building. For a technical services librarian, however, implementation of computer systems and describing materials to facilitate discovery are both as important as other types of librarianship or archival work to our users and their academic success. Additionally, librarians and archivists should be able to perform effectively and with flexibility in a variety of tasks and often in a variety of library or university departments. **When pursuing promotion to a higher rank, librarianship or archival work is as important to our professions as teaching is to faculty and will be weighted at 60% of an individual's candidacy for promotion to the associate level and at 45% for promotion to the senior level.** The UT Arlington Libraries' most basic role is to support the teaching, learning, and research mission of the University and its faculty. Librarians and archivists will be evaluated in this category most strongly on their performance in public services and technical services roles involving the creation, management, and organization of knowledge; user exploration/education; and evaluation and implementation of emerging technologies.

### Evidence of Excellence

Based on the Libraries' mission within this University, librarianship or archival work will receive the majority of weight when a candidate for promotion to the associate level is evaluated. The summary of the annual performance reviews will provide the information needed for the rubric that correlates to this section. For promotion to the senior level, the focus on librarianship or archival work is reduced and the scholarly activities and service portions of the dossier are given more weight because senior librarians and archivists should be clear leaders in these areas of their profession.

Evidence of effective librarianship or archival work may be demonstrated by (but not limited to) the examples below that supervisors can use when composing their letters that are part of the annual performance evaluation process (see Annual Reviews and the Promotion Process: Expectations of Supervisors on page 13). Obviously, not every associate of the faculty will be performing all of the following roles; this list is meant to demonstrate most of the functions of librarians and archivists in our Libraries.

- Establishing and nurturing productive liaison relationships with the faculty and students of designated departments;
- Developing and/or implementing programs that advance information literacy skills in our users;

- Creating and/or implementing instructional or other course-related materials, such as research guides and tutorials;
- Collaborating with teaching faculty to develop and assess curricular objectives.
- Developing and/or implementing effective point-of-use instruction with library users through individual consultations, virtual assistance, etc.;
- Creating user assistance materials that serve curricular objectives, such as bibliographies, subject guides, web pages, and other tangible information products;
- Identifying, evaluating, and implementing effective methods and systems for creating, organizing, classifying, or otherwise making information resources, including locally unique materials, easily discoverable by users;
- Evaluating, implementing, and managing third-party applications that integrate with local data;
- Developing and/or implementing effective methods of negotiating agreements and acquiring materials either through purchase, leasing, resource sharing, or donation;
- Creating and/or implementing effective methods of soliciting, ingesting, and curating University-produced scholarship, documents, and records;
- Effectively managing library collections through budgeting; qualitative and quantitative assessment of collection strengths, weaknesses, and use; selection and deselection in assigned areas; and preservation or curation in all formats;
- Effectively leading projects or staff in the pursuit of work that supports University teaching, learning, and research;
- Designing and/or implementing workflow systems that enhance staff productivity;
- Creating and implementing assessment plans to analyze user needs, experiences, and behaviors to improve both in-person and digital services, facilities, and resources;
- Designing, implementing, and/or managing information systems, applications, and emerging technologies that support user needs or enhance their experiences;
- Establishing and/or participating in outreach and communication activities that inform and involve those who may not be aware of what the Libraries offer, including UT Arlington faculty, staff, students, alumni, donors, and other people with connections to the University. These activities may include extensive and regular social network posts, newsletters, lecture series, and other library programming;
- Establishing and/or participating in outreach and communication to the University and broader community regarding issues related to scholarly communications, new publication and scholarship models, open access initiatives, digital humanities, and data curation and management across all disciplines;
- Discovering grant opportunities, writing grant proposals, and participating in development work that supports programs and initiatives across the Libraries.

Librarianship or archival work at an academic library is characterized by team processes and frequent communication within a complex organization. **Librarians and archivists cannot be effective unless they actively create, engage, and participate in a collegial environment.** Candidates will be evaluated in librarianship on their demonstration of the UTA Libraries' core values as listed in the Introduction on page 5. These values and other interpersonal skills that relate to librarians' and archivists' roles will be evaluated as part of a candidate's professional competence.



When candidates are evaluated during performance appraisals, all areas of librarianship or archival work relevant to that individual will be considered. Supervisors will define these core areas clearly for each librarian or archivist at the beginning of the probationary period and whenever they are substantially changed.

### Scholarship, Research, or Creative Achievements

Scholarship is an important consideration in the overall development of librarians and archivists in the academic environment, and recent scholarship (within the previous five years) is required in order for Track-1 associates of the faculty to advance. *Scholarship* encompasses activities that engage the individual in additional learning related to an appropriate area of inquiry, which is then made available to other professionals through publication or other tangible means. The output of scholarship is scholarly material. *Scholarly materials* are defined as those original contributions to the profession that advance knowledge among practitioners and explore or share new theories, practices, or ideas. Peer review of a particular scholarly work lends weight to its contribution to the profession, but peer review alone is not the measure of the value of scholarly materials. **Scholarship will be weighted at 20% of an individual's candidacy for promotion to the associate level and at 30% for promotion to the senior level.**

Scholarly achievement is often a significant factor for librarians and archivists who do considerable collaborative work in professional organizations. Scholarly achievement includes those activities in which a librarian or archivist is distinguished in terms of professional recognition or responsibilities; appointment to an editorial board; or involvement in the creation of professional standards, guidelines, etc. (See Appendix A: Examples of Scholarly Materials or Activities on page 22.) General participation in professional organizations, such as election or appointment as a committee member or chair, should be considered professional service. At times, the distinction between scholarly achievement and service will be a gray area, and individuals will need to provide clear justification regarding which activities should be considered scholarly achievement. More specific examples are provided in Appendix A: Examples of Scholarly Materials or Activities on page 22.

### Evidence of Excellence

Librarians and archivists should demonstrate steady involvement in scholarship throughout their careers. Strong weight will be given to scholarship published in peer-reviewed sources, but publications at the regional level and even within the Libraries will also receive consideration. Librarians and archivists are encouraged to explore issues and problems concerning the Libraries' services to our users and develop informed programs to improve these services. Additional education that supports the changing needs of the campus is another form of scholarship that suits the Libraries' mission. In all cases, scholarly activity should be documented in some tangible form that allows for disseminating this information to other educators or professionals.

Since librarianship and archival work are highly collaborative professions, it is expected that many scholarly activities will result in joint projects and publications. In fact, the nature of this collaborative scholarship—the integration of the perspectives of different library units, campus departments, or academic disciplines—may often add value to the work. When this work is reviewed for its merit in the promotion process, the candidate for promotion should indicate the

nature of his or her contributions to the work (i.e., whether the candidate was a primary, secondary, or overall equal contributor).

Shorter presentations of scholarship, such as poster sessions and presentations at conferences, may sufficiently demonstrate effective scholarly learning and publication to peers. Materials that are disseminated beyond the Libraries via open access, such as additions to UT Arlington's ResearchCommons digital repository, may frequently be more useful to other professionals than traditional journal articles. Therefore, unless otherwise prohibited by agreements with a conference organizer, **all conference posters and presentation materials must be deposited in the ResearchCommons in order to count toward promotion.** In addition to the actual content, these materials will be evaluated on their cogency and contribution to the profession by the AFPRC and, when available, metrics such as citations and number of downloads from the repository.

### *Categorization of materials*

Sometimes, the same type of material (e.g., a lecture) could be slotted into any one of the three main categories (i.e., librarianship or archival work, scholarship, or service). For example, librarians and archivists may offer one lecture as a part of their teaching (considered librarianship or archival work), another as a conference presentation (considered scholarship), and a third for a local organization (considered service). An example of a textual project may be the work completed as part of an inventory. Creation of procedural documentation for the inventory would be considered librarianship or archival work. Publication of an article or book that includes analysis, assessment, discussion, lessons learned, and so forth would be considered scholarly work. Sharing this documentation among colleagues at other libraries could be considered service. Assigning an appropriate category will depend on characteristics such as the content of the work, its audience, its long-term value versus immediacy of purpose, its depth of intellectual content, and others. Associates of the faculty who have questions about how to categorize a given piece of work should consult with a member of the AFPRC.

It is considered normal and acceptable for a new librarian or archivist with probationary status to come to UT Arlington without established research interests. While it is not expected that significant scholarship be demonstrated during the first year, librarians and archivists should show some initiative in this area by their second-year formal review and tangible evidence of scholarship by the fourth-year formal review. To be promoted to any rank, the candidate must have demonstrated evidence of successful scholarly achievements and the ability to continue this work in the future. To be promoted from associate to senior rank, candidates must demonstrate continued scholarship between the time of their promotion to associate rank and the time they apply for senior rank.

Evidence of effective scholarship, research, or other creative achievements may include (but are not limited to) the materials outlined in Appendix A: Examples of Scholarly Materials or Activities on page 22.

### **Service**

Similar to scholarship, service to the profession is also an important consideration in the overall development of librarians and archivists in the academic environment, and recent service (within the previous five years) is required in order for Track-1 associates of the faculty to advance.

Also, it is required that at least one type of service be at the state or higher level (i.e., state, multistate regional, national, or international) within the past five years. Librarians and archivists have unique roles on campus since much of our activity is directly in service to other departments. Because service is integral to our work as librarians and archivists, many activities that serve others on campus will therefore be classified as librarianship rather than service. **Service will be weighted at 20% of an individual's candidacy for promotion to the associate level and 25% for promotion to the senior level.**

### Evidence of Excellence

Our Libraries value service in a variety of forms because this participation enhances both in-person and virtual communication and relationships among individuals in the Libraries, our community, and our profession. Types of service for which librarians and archivists will be evaluated may include but are not limited to the following:

1. Departmental service: This category includes contributions to the mission of the Libraries outside of one's normal responsibilities to the Libraries, such as participation in interdepartmental committees, task forces, special projects, events, and so on.
2. University service: This category includes service outside of one's normal librarian or archivist role, such as participation on University committees and task forces and other similar contributions to the mission of the University.
3. Professional service: This category includes participation in and contributions to the professions of librarianship or archival work principally through activities with professional and scholarly organizations. Note: when those contributions to the profession result in tangible outcomes, including but not limited to formally published guidelines, training materials, best practices, and conferences, they should be considered under the category of scholarship in addition to service. For example, a librarian serving on an ACRL committee can count the committee membership as service but can also count a white paper she or he coauthored as part of the committee's work as scholarship.
4. Community service: Librarians and archivists are encouraged to use their knowledge and skills to contribute to the community in which our University operates through consultation, volunteer activities, and other forms of assistance. This work should be related to the profession, but that relationship can be broadly defined (e.g., judging science fairs at a K–12 school or literacy volunteer work at the public library).
5. Teaching outside the libraries, mentoring, and coaching: Associates of the faculty may choose or be invited to teach for-credit courses at UT Arlington or other universities or colleges. They may also be involved in formal or informal mentoring or coaching programs. This type of service is especially important for promotion to the senior librarian or archivist rank.
6. Awards and honors.

### The Promotion Process

The entirety of the curriculum vitae (CV) will be evaluated at the time that any librarian or archivist applies for promotion. This includes current librarians or archivists as well as future hires.

It is the responsibility of at least one member of the AFPRC to meet with all finalists for librarian or archivist positions to make them aware that all of their achievements in scholarship and service reflected on their CV are relevant to their status at the UTA Libraries and to advise them that they should negotiate accordingly. The AFPRC will use the *Scoring Rubric with Examples* Excel file to make a recommendation as to the status (assistant, associate, or senior) of the candidate(s) at the time of hire to the dean of the Libraries. The final decision regarding the candidate's status resides with the dean.

### **Expectations of Performance: Promotion from Assistant Librarian/Archivist to Associate Librarian/Archivist and to Senior Librarian/Archivist**

As stated earlier, the promotion process at UT Arlington Libraries is optional but strongly encouraged; thus this section will contain information for those who choose to apply for promotion to associate or senior rank (Track 1).

Promotion from assistant librarian/archivist to associate librarian/archivist at UTA Libraries is based on a candidate's demonstration of excellence in the three major areas of review (librarianship or archival work, scholarship, and service), as well as the candidate's demonstration of promise for the future. The AFPRC will give considerable weight to evidence that the candidate has progressed in effectiveness from the time of hire through the promotion review. The AFPRC will use the *Scoring Rubric with Examples* Excel file as a guideline to provide objective criteria in arriving at and submitting a recommendation to the dean of the Libraries. This step in the promotion process should reflect true growth of the individual in the profession.

To achieve promotion from associate librarian/archivist to senior librarian/archivist, the candidate must document a record of continued outstanding performance since promotion to associate rank and true mastery of required responsibilities and additional activities that demonstrate the candidate's initiative and innovation as a librarian or archivist. Some examples of mastery could be the provision of mentoring, coaching, or training to colleagues within the profession. An outstanding record is one in which the candidate can establish evidence for his or her continued development after promotion to associate librarian or archivist that exhibits a level of mastery, distinction, and/or professional reputation, which should preferably be of national character or scope. The record should exhibit the following attributes:

- **Librarianship or Archival Work:** A consistent pattern of growth and professional development that is considered by peers to exhibit mastery and distinction in professional practice; innovations with long-lasting influence; positive and substantive contributions to the profession and to the University's mission.
- **Scholarship:** Contributions of scholarly and creative products and activities to the professional and/or academic discourse that demonstrate maturity and depth of thought as well as usefulness to the University and/or the profession; quality of this work is more important than quantity.
- **Service:** Contributions to UTA Libraries, University, professional, and community service with an emphasis on activities that support UTA Libraries' and the University's goals; engagement in leadership activities at the Libraries, University, and professional levels that lead to improvements in the activities and functions of those entities.

As noted previously, the Libraries' weighting of the criteria changes between ranks. Librarianship or archival work (45%) is deemphasized for the promotion to senior librarian or archivist, whereas scholarship (30%) and service (25%) are weighted more heavily. The successful candidate for senior librarian or archivist will have established a record of excellence in these areas and will have demonstrated his or her abilities as a leader and mentor in the profession.

All librarians and archivists will participate in annual performance evaluations, regardless of rank or track.

### **Annual Reviews and the Promotion Process: Expectations of Supervisors**

As noted earlier, when candidates are evaluated during performance appraisals, all areas of librarianship or archival work relevant to that individual will be considered. Supervisors will define these core areas clearly for each librarian or archivist at the beginning of the probationary period and whenever they are substantially changed.

Supervisors will provide a copy of this policy document to all associates of the faculty. Meetings between the supervisor and the librarian or archivist may be initiated by either person in order to seek or provide periodic guidance toward the associate's desired rank. The annual performance evaluations of both the supervisor and the associate will document whether the appropriate guidance is taking place on a continual basis. At a minimum, supervisors should closely guide their associates of the faculty through this process, serving as a sounding board and meeting often with them to discuss their development and review their in-progress dossiers. Supervisors and associates of the faculty should also document long- and short-term goals, which must be submitted in writing to the AFPRC along with the two-year and four-year preliminary progress dossiers and with the final promotion dossier. Both the supervisor and the associate of the faculty should sign this document.

As part of the annual review process, all supervisors will compose and send a letter to their librarians or archivists to inform them where they are in the promotion process; the supervisor and librarian or archivist will also meet to discuss the letter. The letter should include a discussion of whether the librarian or archivist is meeting the above-mentioned goals for his or her place in the promotion process. It should also include action items for the goals that are not being met so that the librarian or archivist has a clear picture of how to improve his or her progress. These letters will not be submitted to the AFPRC nor will they be part of the formal promotion process. However, they still will play an integral role in informing each librarian or archivist of his or her professional development progress, and as such they are crucial to the promotion process.

Annual performance reviews will be summarized by Libraries Administration and submitted to the committee as part of the preliminary progress reviews at the second and fourth year as well as with the final dossier. The summary will consist of the librarian's or archivist's overall rating for each previous year and the summary paragraph of the most recent year.

### **Informal and/or Formal Mentoring**

The chair of the AFPRC will assign mentors for newly hired librarians/archivists from the AFPRC for their first six months. After this time, they will choose a mentor to work with who may or may not work within the UT Arlington Libraries. Mentors outside the UTA Libraries

should be provided a copy of this policy document. Individuals may have several mentors during the time leading up to the promotion review.

## Promotion Timelines and Processes

### Assistant Librarian/Archivist to Associate Librarian/Archivist

1. Assistant librarians and archivists should consider applying for promotion to associate librarian or archivist during or following their sixth year of post-master's degree experience.<sup>1</sup>
2. Individuals can decide at any time whether they wish to go on or off Track 1 and apply for promotion. However, so that Libraries' Administration may make informed decisions regarding the budget, **all associates of the faculty must notify their supervisor of their intentions regarding their track and whether they are submitting their dossier for promotion during the next promotion cycle (in March); this notice must be submitted in writing with a copy to the chair of the AFPRC by January 15 of each year.**<sup>2</sup> From the first day of employment, individuals should be retaining and organizing all documentation that relates to their promotion process in the binder that will be provided to them or in a digital folder system that will be set up for them by the AFPRC during their initial career status orientation with the committee.
3. All associates of the faculty will participate in a performance evaluation with their supervisor each year.
4. On March 1, during associates' of the faculty second and fourth years on Track 1 (from the time individuals declare their choice of Track 1, the two-year review clock starts on January 15), they will submit a preliminary progress dossier to their supervisor and to the AFPRC, who will evaluate it and give detailed written feedback in the form of a letter by June 1 regarding whether the employee is on track or needs to work on specific areas. These two feedback letters will be included in subsequent submissions of the dossier.
5. The sixth year is the promotion year, and on March 1 candidates for promotion will submit a full promotion dossier (see Documentation for Candidates for Promotion on page 19 for complete description). The AFPRC will evaluate the dossier and make a recommendation in writing to the dean by June 1; this recommendation will clearly reflect the use of the rubric in the evaluation process and will also specify the areas in which the committee may have been required to make judgment calls. The dean will respond in writing to the candidate by July 15 with a final decision, including a written narrative that supports the decision and enumerates the reasoning behind it. If the AFPRC recommends promotion and the dean concurs, both documents (from the committee and from the dean) should be included in the dossier and retained in the candidate's Libraries personnel file. If the committee does not recommend promotion and the dean concurs, the documents from the committee and the dean will be placed on file with Libraries

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<sup>1</sup>From this point forward in the document, "post-master's degree experience" refers to individuals who have earned a master's in library and information science or equivalent (e.g., MIS, MLS, MSIS, etc.) or other master's degree that enables them to obtain a librarian or archivist position at UT Arlington or other institution.

<sup>2</sup>Note: in the event that a specific date named in this policy falls on a holiday or weekend, the next business day becomes the deadline.



Administration as part of the individual's personnel file. If the candidate later reapplies for promotion and is successful, the documentation regarding the unsuccessful attempt will be removed from his or her personnel file and replaced with the subsequent documentation of promotion. If the AFPRC makes a recommendation and the dean does not concur with that recommendation, the dean's decision will be final, and the candidate will receive copies of the dean's letter and the committee's letter. Again, these letters will be made part of the candidate's personnel file.

6. One of two results will occur at this point:
  - a. The candidate for promotion is promoted to associate librarian/archivist and will receive a salary increase of \$3,500 (this amount is based on the University standard for faculty established in 2015). The effective date of the promotion will be September 1.
  - b. If the candidate is unsuccessful, she or he may reapply during the next cycle or at any subsequent cycle.

### **Associate Librarian/Archivist to Senior Librarian/Archivist**

1. Participating in the promotion process from associate to senior librarian/archivist is strongly encouraged but not mandatory. In other words, associate librarians and archivists can move between Track 1 and Track 2 at any time. However, so that Libraries' Administration may make informed decisions regarding the budget, **all associates of the faculty must notify their supervisor of their intentions regarding their track and whether they are submitting their dossier for promotion during the next promotion cycle (in March); this notice must be submitted in writing with a copy to the chair of the AFPRC by January 15 of each year.** Although the recommended amount of experience is not set in stone, most candidates should consider applying for senior rank during or following their tenth year of post-master's degree experience. Individuals considering applying for senior librarian or archivist rank should examine their record with great care and ensure that they have a mastery level of expertise in their particular area of librarianship or archival work.
2. All associates of the faculty will participate in a performance evaluation with their supervisor each year.
3. Once individuals have decided in consultation with their supervisor to apply for senior rank, they should submit their dossier (see Documentation for Candidates for Promotion on page 19 for complete description) by March 1. The AFPRC will evaluate the dossier and make a recommendation in writing to the dean by June 1. This recommendation will clearly reflect the use of the rubric in the evaluation process and include the rubric scores. It will also contain a narrative that elaborates the areas in which the committee may have been required to make judgment calls. The dean will share this letter with the candidate and will also respond in writing to the candidate by July 15 with a final decision, including a narrative that supports the decision and enumerates the reasoning behind it. If the AFPRC recommends promotion and the dean concurs, both documents (from the committee and the dean) will be included in the dossier and retained in the candidate's Libraries personnel file. If the committee does not recommend promotion and the dean concurs, the documents from the committee and the dean will be placed on file with

Libraries Administration as part of the individual's personnel file. If the candidate later reapplies for promotion and is successful, the documentation regarding the unsuccessful attempt will be removed from his or her personnel file and replaced with the subsequent documentation of promotion. If the AFPRC makes a recommendation and the dean does not concur with that recommendation, the dean's decision will be final, and the candidate will receive copies of the dean's letter and the committee's letter. Again, these letters will be made part of the candidate's personnel file.

4. One of two results will occur at this point:
  - a. The candidate for promotion is promoted to senior librarian/archivist and will receive a salary increase of \$5,000 (this amount is based on the University standard for faculty established in 2015). The effective date of the promotion will be September 1.
  - b. The candidate is denied promotion and may reapply as many times as she or he wishes in subsequent years. She or he will remain at the level of associate librarian/archivist.

To encourage senior librarians/archivists to remain active professionally and to mentor and help develop other librarians/archivists, all senior librarians/archivists will remain on Track 1 for the remainder of their careers at UT Arlington Libraries. Because we highly value these contributions to the professions, annual reviews will reflect contributions of all Track-1 librarians and archivists. Should they receive two consecutive annual reviews with an overall score of *I* (Improvement Needed), they will be removed from Track 1 and thus lose guaranteed travel and training funding.

## Appeals

It is the right of an associate of the faculty to appeal an unfavorable promotion decision once it has been rendered by the dean. Upon receipt of a negative decision by the dean, the associate of the faculty will have five (5) working days in which to file with the provost a written notice of the intent to grieve the decision. Upon receipt of the written notice, the provost will schedule a meeting with the associate of the faculty within ten (10) working days. The associate of the faculty may present a grievance, in person, to the provost on an issue or subject related to the decision to deny promotion. The provost shall notify the associate of the faculty of the result of the grievance within ten (10) working days. The decision is not subject to further review. Please note the following:

1. The burden of proof is upon the affected associate of the faculty to establish by the greater weight of the credible evidence that the decision in question was made for reasons that are unlawful under the Constitution or laws of Texas or the United States;
2. The administration of the University need not state the reasons for the questioned decision or offer evidence in support thereof unless the affected associate of the faculty presents credible evidence that, if unchallenged, proves the decision was made for unlawful reasons.



## Early Application for Promotion

Early application for promotion to associate librarian or archivist is not encouraged for recently graduated librarians and archivists because the same rigorous requirements for promotion will be applied. However, some librarians and archivists who are hired with previous experience may meet the requisite standards for promotion before the standard six-year timeline is complete. Therefore, with the formal approval of their supervisor, assistant librarians and archivists who have previous professional experience may apply for promotion after their second-year review or later in the subsequent cycle. This early application submission process must follow the same general timeline as outlined above (i.e., it must start on March 1).

Associate librarians may also wish to apply before their 10-year post-master's degree experience is complete. As above, early application for promotion to associate librarian or archivist is not encouraged, but it is permitted as long as candidates consult closely with their supervisors and obtain the supervisor's support.

## Composition of the AFPRC

The AFPRC comprises nine individuals, each of whom has an equal voice in the final recommendation. Minimum requirements to serve on the committee are as follows:

1. Committee members must have at least two years of experience as a librarian or archivist and at least one year of service at UT Arlington Libraries as a librarian or archivist.
2. Any rank of librarian/archivist is welcome to serve on the committee.
3. At any given time, at least one senior librarian/archivist must be on the committee. If one is not elected, the dean's appointee will come from that rank.
4. Anyone who has served as a significant mentor to a given candidate for promotion should recuse herself or himself from reviewing that candidate's dossier if the mentor is on the AFPRC during that candidate's promotion year. *Significant mentor* is defined as the individual's supervisor or another librarian or archivist who has served as a mentor to that individual within the past 12 months. Members of the AFPRC should also voluntarily recuse themselves if that member or multiple members of the AFPRC feel that that individual could not be objective about the candidate because of a perceived conflict of interest (e.g., personal relationship, either negative or positive).
5. Term of service is three years.
6. The committee will elect a chair each year; the same person can serve three consecutive terms as chair if she or he is reelected and is willing to serve in that capacity.
7. Three members will rotate on and off the committee each year.
8. In the first configuration of AFPRC, one third of the members will serve one year, one third will serve two years, and one third will serve three years. The AFPRC members will determine a process to decide which members will serve how many years.
9. Until governance for the associates of the faculty has been established, the AFPRC will be in charge of the election for members of the committee. The AFPRC chair will put out a call for nominations on the first regular business day of January. Associates of the faculty can nominate any eligible associate of the faculty to serve on the committee,

including him/herself. A minimum of three people must be nominated. The election cannot go forward if two or fewer people are nominated. A quorum (defined as 50% + 1) of associates must vote in the election for it to be considered valid.

10. Elections will start the third Monday in January and conclude one week later. The two nominees with the highest number of votes will be elected. Within two weeks of the conclusion of the election, the dean will appoint the third member. (Note: see rule 3 above.)
11. In the event of a vacancy on the AFPRC, if the person departing was a dean appointee, the dean will appoint another person to complete the term. If the vacancy is caused by the departure of an elected member, the AFPRC will hold an election to fill the vacancy to complete that term. (See rule 9 above for election details.)

### Process for Evaluating Dossiers

Below is the procedure the AFPRC will follow in their decision-making process:

1. If a committee member must be absent for a significant period of time during the evaluation period, she or he must make every effort possible to participate in the process, even if it is virtually. Exceptions will be made for individuals on family or medical leave (FMLA). A minimum of seven of nine of AFPRC members must participate in the decision-making process.
2. All committee members shall review candidates' dossiers prior to the initial meeting and objectively evaluate them using the criteria in the *Scoring Rubric with Examples* Excel file.
3. A preliminary review that reflects committee members' rubric scores will first take place. If this review results in a two-thirds majority of members participating in the decision-making process to recommend promotion of the candidate, then the committee can proceed to compose the letter of recommendation for promotion to the dean (see details in step 5 below).
4. If committee members are unable to reach a two-thirds majority of members participating in the decision-making process that a candidate should be recommended for promotion, the committee should discuss the pros and cons of the candidacy. After this discussion, if there is still not a two-thirds majority in favor of promotion of a given candidate, then the result is that the candidate is not recommended for promotion. At this point, the committee will compose a letter to the dean not recommending promotion (see details in step 5 below).
5. As noted above, the AFPRC must state in writing whether their recommendation is favorable or not. Specifically, the committee's letter to the dean should include one of the following statements:
  - a. The committee unanimously supports the promotion of [candidate's name].
  - b. The committee unanimously does not support the promotion of [candidate's name].
  - c. The committee supports the promotion of [candidate's name].
  - d. The committee does not support the promotion of [candidate's name].

The latter two statements would mean exactly what they say but would have the additional meaning that the vote was not unanimous. In the case of (1), the committee

would express the reasons why they unanimously support this candidacy. In the case of (2), the letter would need to provide ample evidence as to why this candidate is not receiving a recommendation for promotion. In the case of (3), the letter would list many specific reasons in favor of promotion but also describe the areas of concern that prevented the vote from being unanimous. In the case of (4), the letter should describe some of the candidate's positive accomplishments but mainly address the areas of concern that caused the committee to not recommend promotion. This final recommendation and overall rubric score should be conveyed to the dean of Libraries in a formal letter signed by all committee members within the deadline stated in Promotion Timelines and Processes on page 14. The AFPRC chair will meet with the dean to give him or her the recommendation letters for that year and will verbally provide the dean with the committee's vote tallies without revealing which members voted for or against promotion of the candidate. The dean will share this written recommendation with the candidate and make it part of her or his personnel records but will not share the committee's vote tally.

## Documentation for Candidates for Promotion

In preparing documentation for the promotion process, candidates should follow the guidelines below in order to provide the most complete and informative presentations to the AFPRC.

**Specifically, the AFPRC requires that candidates submit documentation for each category numerated below (Items I–VIII) before or on the required date. Failure to provide any one of the items will result in the candidacy not moving forward.** Candidates must provide proof of responsibility for their scholarly output and service when possible.

In particular, candidates are required to submit materials in a common format, not only in the documentation but in addressing each of the criteria. The experience of the AFPRC indicates that dossiers that are formatted uniformly facilitate fairness and more informed decisions.

The AFPRC requires the following materials to be submitted in one continuous PDF document in the following order:

- I. A brief guide to the submitted material (i.e., a table of contents).
- II. A letter of introduction and self-evaluation addressed to the AFPRC. Using the three categories of (a) librarianship or archival work; (b) scholarship, research, and/or creative achievement; and (c) service, candidates should describe their extraordinary contributions, accomplishments, and achievements thus far in their career. This document should include a brief summary and analysis of how activities in the candidate's dossier illustrate and support his or her goals, accomplishments, and career development, as well as how he or she has exemplified the Libraries' core values. The AFPRC emphasizes the importance of the self-evaluation and urges candidates to take great care in its preparation. Candidates will limit this evaluation to no more than three pages.
- III. A current curriculum vitae whose contents are derived from the UT Arlington online faculty profile system. **To aid the AFPRC in its evaluation process, candidates should carefully review the rubric (see the *Scoring Rubric with Examples Excel* file) and construct their CVs following its organizational structure.** See Appendix B: Guidelines for Completing Categories in the UTA Online Profile System on page 26 for useful information about completing an online profile.

- IV. Evidence of librarianship or archival work (see Evidence of Excellence under Librarianship or Archival Work on page 7): A letter from the candidate's supervisor<sup>3</sup> indicating his/her level of support for the candidate's promotion. This letter should include a discussion of the candidate's strengths and weaknesses in regard to the following categories: (a) librarianship or archival work; (b) scholarship; (c) service, and (d) adherence to the values of the UTA Libraries (see Introduction on page 5). This letter should provide a synopsis and analysis of the annual review letters written by the supervisor, as well as the candidate's subsequent professional development progress since the most recent performance review. Before the dossier is formally submitted, the candidate and his/her supervisor should meet to have a final discussion of the dossier and the supervisor's letter.
- V. Evidence of scholarship, professional achievement, and/or artistic achievement. This evidence should be the finished products resulting from the activities described in Appendix A: Examples of Scholarly Materials or Activities on page 22.
- VI. Evidence of service to the Libraries, University, profession, and community. Candidates must provide a website screenshot or PDF of an invitation letter or email showing evidence of service for election or appointment to a professional or scholarly organization committee, task force, special project, or event at the following levels: national or international, state or regional, and/or University or departmental (i.e., Libraries). Candidates must provide documentation of appointment(s) to teach for-credit courses at UT Arlington or other universities. Candidates must provide copies of email correspondence establishing a formal or informal mentoring or coaching relationship with other professionals. Any award or honor is eligible for inclusion. Candidates must provide a PDF copy of the award letter or certificate for each award or honor.
- VII. A summary document of the candidate's yearly performance evaluations from Libraries Administration. The summary will consist of the librarian's or archivist's overall rating for each previous year and the summary paragraph of the most recent year.
- VIII. Copies of the two feedback letters the candidate received from the AFPRC at his or her two- and four-year review.

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<sup>3</sup>If the candidate's supervisor has been supervising the candidate for less than one year, the committee encourages the candidate to obtain an additional letter from his or her former supervisor when possible.

## References

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## Appendix A: Examples of Scholarly Materials or Activities

Definitions of *scholarship* and *scholarly materials*:

As stated on page 9, *scholarship* encompasses activities that engage the individual in additional learning related to an appropriate area of inquiry, which is then made available to other professionals through publication or other tangible means. The output of scholarship is scholarly material. *Scholarly materials* are defined as those original contributions to the profession of librarianship or archival work that advance knowledge among practitioners and explore or share new theories, practices, or ideas. Peer review of a particular scholarly work lends weight to its contribution to the profession, but peer review alone is not the measure of the value of scholarly materials.

All scholarly materials and activities should be focused on librarianship or the archives profession, or if published outside of these fields, somehow related or tied back to them. Occasional publications completely outside these professional foci may be considered on a case-by-case basis.

(Ideas and input on this section came from Ippolito, Blais, Smith, Evans, & Stormer, 2009.)

1. Formal scholarly publications (print or electronic). Candidates must provide a PDF of the relevant page(s) from the publication that shows the author's name (or authors' names) and the title of the publication as evidence for these materials. For most books, it will suffice to have a PDF of the title page and for edited books a copy of the table of contents. For journal articles, candidates should provide a PDF of the first page of the article and evidence that the journal is peer-reviewed (if indeed it is).
  - a. Authored or edited books published by a scholarly press;
  - b. Peer-reviewed journal articles;
  - c. Chapter contributions to an edited book;
  - d. Articles in a journal or trade publication that are not peer-reviewed;
  - e. Book reviews;
  - f. Editorial or analytical articles in a journal or trade publication;
  - g. Invited authorship of any of the above publications;
  - h. Professionally published bibliographies or other substantial, special-topic user guides. Note: regular disciplinary subject guides are considered part of librarianship.
2. Informal publications (print or electronic). Candidates must provide a PDF of the relevant page(s) from the publication that shows the author's name (or authors' names) and the title of the publication as evidence for these materials. For items *h* and *i*, candidates should include a PDF screenshot of the website or the introduction to the software where the author's name (or authors' names) appears, when possible.
  - a. Project-related working papers or preliminary technical/scientific papers or reports;
  - b. Contributions to technical standards and guidelines;

- c. Contributions to guidelines, policies, or training materials for librarians or archivists;
  - d. Analysis of library or archival collections or services, disseminated internally or externally, that clearly relates current problems and solutions to other scholarship informing those issues. This analysis can be consortial, committee, or individual work depending on the analyses;
  - e. Reports and procedures generated by task forces and strategic planning committees;
  - f. Grant proposals;
  - g. Articles in the popular press (newspapers and magazines) or other nontraditional publications;
  - h. Creation and continued administration of social media outlets that are in-depth, substantive, currently relevant, and focused on the profession itself (i.e., archives and/or libraries) or on issues closely related to the profession. They should also contribute to dialogue within the profession at a local, regional, and/or national level. Postings to others' blogs that are in-depth, substantive, and focused on the profession are also acceptable.
  - i. Original creation of mobile apps or other software.
3. Scholarly activities.
- a. Service as a reviewer or editor of a peer-reviewed journal or service as an invited editor of a special issue of a journal. Candidates must provide a PDF of either the invitation to serve as reviewer or editor (i.e., the letter or email) or the cover of the journal where the candidate's name appears.
  - b. Presentations at professional or scholarly conferences. Candidates must provide a PDF copy of the relevant page from the program with the candidate's name or a screenshot of the conference website. This documentation should also show what conference was attended along with dates. Types of acceptable presentations are preconference workshops, paper presentations, invited presentations, panel presentations, and poster presentations.
  - c. Professional presentations outside of conferences (e.g., workshops that are not course-related such as "Word for Dissertation," "Not a Fear Factor," or "RefWorks Workshop;" webinars or TED talks; or an archivist's presentation at a historical society). Candidates must provide a PDF copy of relevant documentation (e.g., a flyer or other announcement with information about the event).
  - d. Creation and curation of extensive exhibitions (both analog and digital). Candidates must provide a PDF copy of the relevant page from the exhibit documentation with the candidate's name or a screenshot of the exhibit website. This documentation should also show the title of the exhibition along with dates (when applicable).

- e. Smaller exhibits or displays (defined as one to two display cases). Candidates must provide PDF copies of photos of the exhibit or display.
- f. Creation of born-digital or digitally converted materials designed for broad dissemination. These should be materials that will continuously grow and are database-driven (e.g., [U.S.–Mexico War](#), [Tejano Voices](#)). Whenever possible, candidates should provide a PDF screenshot of the acknowledgments page for the project where the candidate’s name is shown.
- g. Creation of digital learning objects, which are defined as stand-alone units of knowledge that have content and concrete learning objectives (adapted from UT Arlington Library Strategic Planning Committee 1.1.2, “Guidelines for Developing Digital Learning Objects,” 2010). They include things that are general tutorials or how-to’s. They should be valid for more than one semester (with occasional updates as needed) and available to all faculty and students and the general public on the Libraries’ website. They do not include one-off tutorials (e.g., how to do a specific assignment for a specific class).
  - i. Examples:
    1. Tutorials: “[Acknowledging Sources](#)”
    2. Digital instructional or curriculum kits: “[Labor Activism During the Cold War: The Case of Humberto Silex](#)”
    3. How-to digital brochures and handouts: “[How to Cite Sources Using APA](#)”
    4. Instructional videos: “[EBSCO—Finding Full Text Articles](#)”
    5. Some (not all) LibGuides: “[RefWorks: In-Depth Help](#)”
    6. LibGuides tabs: [SWOT Analysis](#), [Mergers & Acquisitions](#), [How to Locate Engineering Standards](#)
  - ii. Do not include:
    1. LibGuides that are about a discipline in general or specific to a course or topic. If the LibGuide is primarily informational and not how-to, it is not a DLO.
    2. DLOs made by outside entities.

Whenever possible, candidates should provide PDF documentation of anything that demonstrates that they were responsible for creating the DLO. They should also include a screenshot or copy of the piece when possible.

- h. Creation and/or curation of datasets. Candidates must provide proof of responsibility for the dataset when possible.
- i. Creation of metadata that enable discovery of and extraordinary access to rare or unique materials. Candidates must provide documentation from OCLC, ILS, or some other electronic snapshot of the materials they added to the bibliographic universe.



- j. Technical production services related to creation and publication of open-access journals. Candidates should provide a link to the publication plus a letter from the editor regarding the candidate's contribution to the production of the journal or a PDF screenshot of the candidate's name listed as technical support on the publication.
4. Self-development or continuing education activity (e.g., subject-specialist second master's degree, fellowships, Academy of Health Information Professionals [AHIP] Certification, archival certifications, certificate of advanced studies, etc.). Candidates must provide documentation of completion of the activity (e.g., certificate or diploma).

## Appendix B: Guidelines for Completing Categories in the UTA Online Profile System

Candidates should use the UT Arlington online faculty profile system to produce a current curriculum vitae, which is included in the dossier. Please follow the guidelines below when completing an online profile.

- I. About Me
  - a. Biography: short biographical statement (~350 words)
  - b. Professional Preparation: educational degrees earned
  - c. Appointments: past and current positions pertinent to library work
  - d. Memberships: current or past memberships in professional organizations
  - e. Awards and Honors
  - f. News Articles: items featuring the candidate or her or his work
  - g. Links: URLs for one's subject guide profile, LinkedIn profile, and/or professional home page
  - h. Other Activities: volunteer work pertinent to library work that does not fit elsewhere.
- II. Research
  - a. Research and Expertise: brief statement of research focus.
  - b. Publications: Use APA citation style. When possible, applicants should deposit all publications in the UT Arlington ResearchCommons and link from the publications list to the relevant ResearchCommons page. If copyright restrictions do not allow uploading the document to the ResearchCommons, then link to a URL where the publication can be obtained.
  - c. Presentations: When possible, applicants should deposit all presentation or poster materials in the UT Arlington ResearchCommons and link from the presentations list to the relevant ResearchCommons page. Optional but **strongly** encouraged: when possible, link to the conference program online or provide a scanned image of the page of the program with the applicant's presentation or poster listed.
  - d. Projects: for examples, see Appendix A: Examples of Scholarly Materials or Activities on page 22, numbers 2 (Informal Publications) and 3 (Scholarly Activities).
  - e. Support and Funding: Grants awarded as a principal investigator or copincipal investigator.
  - f. Patents.
  - g. Other Research Activities: anything not covered by the above that is scholarly.
- III. Creative Activities: This section is meant primarily for fine arts and performing faculty. If applicants have a question regarding whether they should complete part(s) of this section, please contact a member of AFPRC.
  - a. Live Performances.
  - b. Recordings: example: promotional videos.
  - c. Exhibitions.
  - d. Other Creative Activities.
- IV. Teaching
  - a. Courses: This section should include only credit-bearing or semester-long courses.

- b. **Other Teaching Activities:** All other teaching activities should be listed here. Examples: overviews of course-related instruction, workshops, online tutorials, LibGuides, etc.
- V. **Connections**
- a. **Students Supervised:** List any LIS practicum students or other students supervised, along with dates of supervision.
  - b. **Peers Mentored:** List any peers mentored through a formal mentoring process.
  - c. **Collaborators:** List any collaborators, either external or internal to the Libraries, with whom the candidate is working on significant projects that do not yet have an actual end product (which should go in the Research section) nor a committee (which should go in Service).
- VI. **Service**
- a. **Service to the Community:** List any community service related to the candidate's area of professional expertise.
  - b. **Service to the University:** List memberships in Libraries and University committees and volunteer services.
  - c. **Service to the Profession:** List memberships in committees and volunteer services for professional organizations.
  - d. **Other Service Activities.**
- VII. **Administration:** Do not use.