

Analysis of Proposal to Change Librarian Review Period

What the Committee did

- Reviewed PEARLS documents
- Analyzed:
 - effect of proposed change of review period on librarians
 - steps needed to change review period, if LAUC-D approves
- Developed:
 - materials to explain proposed change of review period
 - draft language for LAUC-D to vote on
- Next Steps:
 - 5/15/12: presentation to LAUC-D & discussion
 - SurveyMonkey vote on proposal

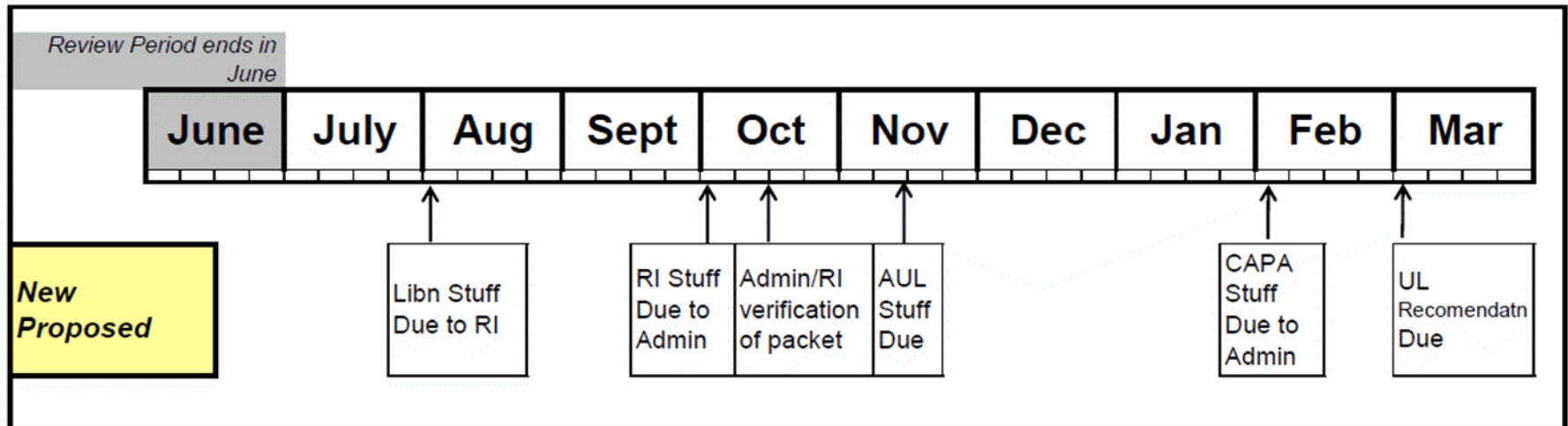
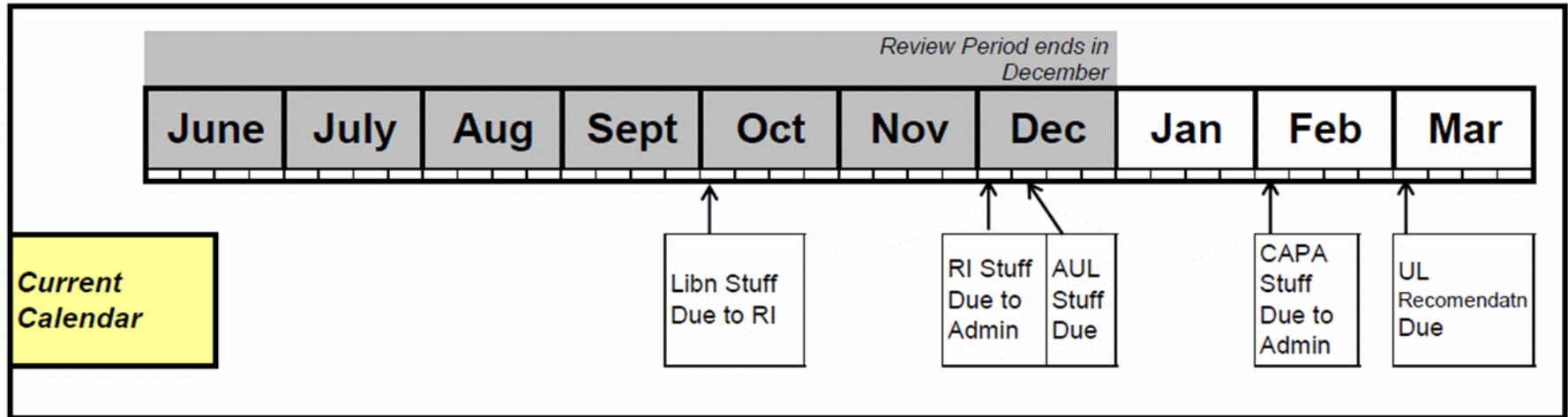
This analysis provides

- Summary and background info
 - Comparison of
 - Current & proposed new calendar
 - Current review period & transition period
 - Tables which allow each librarian to evaluate effect
 - Proposed language for vote
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- *NOT included -- Accelerations/Deferrals:*
 - Recommended approach:*
 - Use appropriate table to closely examine your normal review period
 - Then meet with RI, Lib Admin to evaluate your situation

Let's Review (Background Info):

- The current review periods are based on the calendar year (Jan-Dec)
- The proposal is to switch to review periods based on the fiscal year (July-June)
- Assistant and Associate librarians (except for Associate 7) are reviewed every 2 years
- Librarians (and Associate 7) are reviewed every 3 years
- If librarians vote to change the review period from calendar year (Jan-Dec) to fiscal year (July-June):
 - This will require a transition period where all librarians will have a SINGLE review period that is either 6 months shorter, or 6 months longer than the usual 2-year or 3-year cycle. Each librarian will choose the duration of their transition period (6 months shorter, or 6 months longer).
 - After each librarian transitions to the new schedule, reviews will again cover a full 2 year cycle (for Assistant and Associate librarians, except for Associate 7) or a full 3 year cycle (for librarians and Associate 7)
 - The review calendar (when things are due) will start earlier

Comparison: Current and New Proposed Calendar



How Will The Transition Period Affect You?

1. There are five tables below which correspond to these review periods:

Only ONE table applies to you:

<u>3 Year Cycle</u>	<u>2 Year Cycle</u>
2010 – 2012	2011 – 2012
2011 – 2013	2012 – 2013
2012 – 2014	

2. These tables give:

- review periods;
- date your documents are due;
- date you would receive a salary increase (if awarded)

for both:

- the current Jan-Dec schedule → see shaded “Current Schedule” column
- transition to the July-June schedule → see “Transition Period” column
 - Option A (review period that is 6 months shorter)
 - Option B (review period that is 6 months longer)

Recall that during the transition period, you choose either Option A or Option B

3. Find the ONE table that corresponds to your next review period. Use it to evaluate the effect of the proposed change on you.

Three-Year Cycles

TABLE 1: 2010 – 2012 Review Period

	Current Schedule	Transition Period -- Choose Option A or B	
		Option A (2.5 year transition)	Option B (3.5 year transition)
Review Period	Jan 2010 - Dec 2012	<i>Review covers: Jan 2010 – June 2012</i>	<i>Review covers: Jan 2010 – June 2013</i>
My stuff due	Oct 2012 <i>(3 months before review cycle ends)</i>	Aug 2012 <i>(1 month after review cycle ends)</i>	Aug 2013 <i>(1 month after review cycle ends)</i>
Receive Salary Increase	July 2013	July 2013 <i>(date you receive increase does not change; period between end of review cycle and date increase is received is longer)</i>	July 2014

TABLE 2: 2011 – 2013 Review Period

	Current Schedule	Transition Period -- Choose Option A or B	
		Option A (2.5 year transition)	Option B (3.5 year transition)
Review Period	Jan 2011 - Dec 2013	<i>Review covers: Jan 2011 – June 2013</i>	<i>Review covers: Jan 2011 – June 2014</i>
My stuff due	Oct 2013 <i>(3 months before review cycle ends)</i>	Aug 2013 <i>(1 month after review cycle ends)</i>	Aug 2014 <i>(1 month after review cycle ends)</i>
Receive Salary Increase	July 2014	July 2014 <i>(date you receive increase does not change; period between end of review cycle and date increase is received is longer)</i>	July 2015

Three-Year Cycles (continued)

TABLE 3: 2012 – 2014 Review Period

	Current Schedule	Transition Period -- Choose Option A or B	
		Option A (2.5 year transition)	Option B (3.5 year transition)
Review Period	Jan 2012 - Dec 2014	<i>Review covers: Jan 2012 – June 2014</i>	<i>Review covers: Jan 2012 – June 2015</i>
My stuff due	Oct 2014 <i>(3 months before review cycle ends)</i>	Aug 2014 <i>(1 month after review cycle ends)</i>	Aug 2015 <i>(1 month after review cycle ends)</i>
Receive Salary Increase	July 2015	July 2015 <i>(date you receive increase does not change; period between end of review cycle and date increase is received is longer)</i>	July 2016

Two-Year Cycles

TABLE 4: 2011 – 2012 Review Period

	Current Schedule	Transition Period -- <i>Choose Option A or B</i>	
		<i>Option A (1.5 year transition)</i>	<i>Option B (2.5 year transition)</i>
Review Period	Jan 2011 - Dec 2012	<i>Review covers: Jan 2011 – June 2012</i>	<i>Review covers: Jan 2011 – June 2013</i>
My stuff due	Oct 2012 <i>(3 months before review cycle ends)</i>	Aug 2012 <i>(1 month after review cycle ends)</i>	Aug 2013 <i>(1 month after review cycle ends)</i>
Receive Salary Increase	July 2013	July 2013 <i>(date you receive increase does not change; period between end of review cycle and date increase is received is longer)</i>	July 2014

TABLE 5: 2012 – 2013 Review Period

	Current Schedule	Transition Period -- <i>Choose Option A or B</i>	
		<i>Option A (1.5 year transition)</i>	<i>Option B (2.5 year transition)</i>
Review Period	Jan 2012 - Dec 2013	<i>Review covers: Jan 2012 – June 2013</i>	<i>Review covers: Jan 2012 – June 2014</i>
My stuff due	Oct 2013 <i>(3 months before review cycle ends)</i>	Aug 2013 <i>(1 month after review cycle ends)</i>	Aug 2014 <i>(1 month after review cycle ends)</i>
Receive Salary Increase	July 2014	July 2014 <i>(date you receive increase does not change; period between end of review cycle and date increase is received is longer)</i>	July 2015

Draft Language for Vote (1 of 2)

Should the librarian review period change from calendar year (January-December) to fiscal year (July-June)?

Voting YES, means you agree to everything below:

The following changes will take place:

- Review period change would be effective July 1, 2012, unless needed approvals are not obtained by June 15, 2012. If needed approvals are not obtained by June 15, 2012 this change would be effective July 1, 2013.
- A Transition period will occur, where all librarians will have a ONE TIME review period that is either 6 months shorter, or 6 months longer than the usual 2-year or 3-year cycle. This transition period will not be considered an acceleration or a deferral.
- After each librarian transitions to the new schedule, reviews will again cover a full 2 year cycle (for Assistant through Associate 6) or a full 3 year cycle (for Associate 7 and all full Librarian steps).
- Review calendars (when things are due) will start earlier, see “New Proposed Calendar”.
- Changes to PEARLS documents. These 2 PEARLS documents will require minor changes, as given below:
 - “Annotated Article 4 Process for Merit Increase, Promotion and Career Status”
 - “Checklist for Librarians with Salary Action Reviews”

Draft Language for Vote (2 of 2)

- **PEARLS Change #1:**

“Annotated Article 4 Process for Merit Increase, Promotion and Career Status” makes 2 references to the current (January-December) calendar. The following changes (shown in yellow) will be made in Section 4.C.3:

3. The Call for merit increases, promotions and career status actions and the calendar of due dates for the review process shall be issued and distributed each year to every member of the librarians series no later than thirty (30) days prior to the first required action following issuance of the Call in the procedures. The librarian shall be notified of the decision normally within nine (9) months of the first required action. This deadline may be extended upon the mutual agreement of the parties.

- **The Call and Calendar will be issued by the Library Administrative Office ~~on or before October 1 of each calendar year~~ [CHANGE TO: near the close of the review period]. Upon reasonable justification, extensions of Call dates will be made if requested in advance in writing of the Library Personnel Office.**

Each year ~~during October~~ [REMOVE], the Library Administrative Office, in conjunction with the immediate past members of the LAUC-D Committee on Promotions, Appointments and Advancement (hereinafter CAPA) and the immediate past members of the Academic Federation Personnel Committee who are librarians will prepare a workshop on the process and procedures of the performance evaluation process. [ADD: This workshop should take place prior to the deadline for librarians to submit materials to their Review Initiator.]

- **PEARLS Change #2:**

“Checklist for Librarians with Salary Action Reviews” makes 1 reference to the current (January-December) calendar. The following change (shown in yellow) will be made:

- **~~Prior to October 1~~ [CHANGE TO: near the close of the review period].**

Candidates will receive a letter from Library Administration informing them of their salary action eligibility. Any librarian who is not automatically scheduled for a salary action review may request such a review by informing his/her Review Initiator.