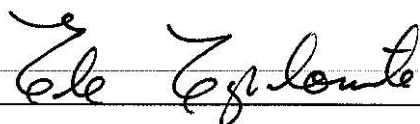

Faculty Policies and Procedures
Lister Hill Library of the Health Sciences
University of Alabama at Birmingham

Approved by Faculty Vote
September 17, 2010

Approved by the Provost



10-27-10

Eli I. Capilouto

Date

Provost

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Helen Kathryn Jones, Assistant Professor, Tenured
Jack Thomas Smith, Jr., Instructor, Untenured
James Avery Thompson, Assistant Professor, Tenured, Chairman

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Michael Flannery, Professor
Gabe Rios, Assistant Professor
Elizabeth Lorbeer, Assistant Professor
John Paul Mussleman, Assistant Professor
Ted Gemberling, Assistant Professor

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INTRODUCTION

The Lister Hill Library of the Health Sciences (LHL), established in 1945, is the largest biomedical library in Alabama and one of the leading such libraries in the South. The Library is an integral part of the University of Alabama at Birmingham (UAB) community.

The Library has as its mission to provide the best biomedical information resources and services to support the teaching, research, scholarship, clinical and community services missions of UAB. It accomplishes this mission through faculty and staff who have both the expertise and commitment to deliver all services required to support the highest quality of education, research, and clinical activities; high-quality information management and educational services; and facilities for the collection and services to meet the needs of faculty, staff, and other users.

The provisions of this document apply to all LHL faculty. This document is not intended as the sole indication of LHL or UAB policies concerning faculty issues. UAB policies affecting LHL faculty are also contained in the current editions of the UAB Faculty Handbook & Policies (<http://www.uab.edu/images/provost/APUP/Handbook.pdf>), You and UAB Handbook (<http://www.hrm.uab.edu/You&UABHandbook/index.htm>), and the Personnel Policies and Procedures Manual (<http://www.hrm.uab.edu/PolicyManual/index.htm>). By UAB policy, this document may be more rigorous and more specific than existing UAB policy, but not less. In all other possible conflicts between this document and any of the above UAB documents, the UAB documents shall prevail.

FACULTY AFFAIRS COMMITTEE

This committee shall be entrusted to: (1) consider and make recommendations to the Director on faculty personnel actions whenever library review is required, and (2) present general advice and recommendations on faculty matters to the Director. The committee shall be comprised of three (3) faculty members with primary appointments elected by the library faculty. The Director may be invited to sit with the committee but is not to serve on it. Among other duties, this committee, in consultation with the Director and LHL Affirmative Action/EEO Officer, shall be charged with the responsibility of ensuring adequate faculty personnel procedures in the Library. If eligible, the members of the Faculty Affairs Committee will serve on the Promotion Committee. The Faculty Affairs Committee will convene an open meeting for all library faculty on a minimum quarterly basis or more frequently if necessary.

The three (3) members of the committee will serve three (3) year terms with one member rotating off the committee annually. The person with the most seniority on the committee serves as the Chair, normally in their third year on the committee. The past chair serves for one additional year as an ex-officio member after his/her term ends. No member can serve consecutive terms.

For elections, the Chair of the Faculty Affairs Committee will draw up a ballot containing the names of the library faculty members eligible to fill the vacancy. (As service on the committee is a responsibility of faculty, eligible members may not request that their names be removed from the ballot.) The ballot will be duplicated and distributed to all library faculty members except those with secondary appointments. Each faculty member will vote for one (1) faculty member to fill the vacancy. The Faculty Affairs Committee Chair and the Director will count the votes and the faculty member receiving the most votes will be declared elected to the vacancy. In case of a tie, a run-off will be held. A ballot with the names of those faculty members who tied in the voting will be drawn up and duplicated. The procedures outlined above will be followed for the actual run-off voting. Elections will be held during the first week of October of each year. Results of the election, and run-off if needed, will be certified and announced by the Director. The Faculty Affairs Committee shall operate on a calendar year beginning January 1 and ending December 31.

Should a vacancy occur during the year, a new election will be held according to the procedure outlined above. The newly elected committee member will serve for the remainder of the term of the person being replaced.

RIGHTS AND RESPONSIBILITIES OF LHL FACULTY

RIGHTS

All members of the LHL faculty with primary appointments are eligible for the rights noted below.

1. Member of the LHL Faculty
2. Vote on LHL faculty issues
3. Serve on LHL faculty promotion committees
4. Serve on LHL search committees
5. Serve on the LHL Faculty Affairs Committee (FAC)
6. Election as a member of the UAB Faculty Senate
7. Election as a member of the UAB Faculty Policies and Procedures Committee (FPPC)
8. Service on University-wide committees
9. Service on University-wide Grievance and Termination Hearing Panel

All members of the LHL faculty with adjunct appointments are eligible for the rights noted below:

1. Member of the LHL Faculty
2. Vote on LHL Faculty issues
3. Service on LHL faculty promotion committees
4. Service on LHL search committees

Under certain circumstances adjunct faculty may serve on a university-wide committee as a representative of LHL.

All members of the LHL faculty with secondary appointments are eligible for the rights noted below:

1. Member of the LHL Faculty
2. Service on LHL faculty promotion committees
3. Service on LHL search committees

Under certain circumstances secondary faculty may serve on a university-wide committee as a representative of LHL.

RESPONSIBILITIES

All members of the LHL faculty with primary appointments are bound by the following responsibilities.

1. Faculty performance
2. Scholarly activity and professional development
3. Service to the library, university, community and profession

DEFINITIONS

See also 2.3.2 – UAB Faculty Handbook & Policies – Non-tenure earning Faculty

Appointment: The act of initiating papers to employ a person in the academic ranks (Instructor, Assistant Professor, Associate Professor, Professor) is called an appointment (as distinguished from promotion).

Primary: Appointment through which the faculty member has the primary academic affiliation. It is through this appointment that recommendations for appointment, promotion, tenure, and other actions concerning a faculty member are initiated.

Secondary: Appointment through which the faculty member has an additional academic affiliation in addition to and outside of the primary appointment.

Adjunct: Appointment through which individuals who are not primarily employees of UAB are appointed to the faculty to perform instructional, research and/or public service functions.

Rank: This designates academic authority within the university structure based upon seniority, accomplishment, and peer recognition. (See also sections on Criteria for Appointment and Criteria for Promotion; see also 2.4 – UAB Faculty Handbook & Policies – Faculty Ranks and Related Criteria.)

Instructor: This rank is generally the initial appointment of a beginning professional librarian without experience or the initial appointment in the Lister Hill Library of a professional librarian with less than three (3) years of health science library experience. Advancement to the next rank is required for continued employment.

Assistant Professor: The professional librarian in this rank has demonstrated ability in librarianship, either at the Lister Hill Library or another health science library. Promotion to Associate Professor is not required.

Associate Professor: This rank is appropriate for the librarian whose professional performance has been consistently above average and who has demonstrated excellence in health science librarianship. Promotion to Professor is not required.

Professor: This rank is for librarians whose professional performance and service have been consistently outstanding and whose prominence in their field reflects superior achievements. Appointment to the rank of Professor requires the demonstration of nationally recognized excellence in the conduct of health science librarianship.

- Promotion: This is the normal procedure for advancement from one academic rank to another. Advancement is not automatic but is based on annual reviews and performance evaluations.
- Reappointment: This is a process by which faculty are granted continued assignment at their current rank.
- Non-reappointment: This is a process by which faculty are not granted continued employment.
- Tenure: This is a commitment between UAB and the individual being awarded tenure. UAB assures the individual of a continuing appointment within UAB at the same academic rank. Tenure at UAB signifies the commitment by the faculty member to continued professional growth and achievement, matched by a long-term commitment of resources by UAB. Promotion of a tenured faculty member indicates continuation of tenure at the new rank.

PROCESS FOR INITIAL APPOINTMENTS

I. Search Committee Process

A. Formation of Committee

In filling faculty positions, the Director shall select a Chair and appoint an ad hoc Search Committee to serve in an advisory capacity. The composition of this committee will be comprised of a minimum two-thirds faculty with professional staff or library assistant representation when appropriate. The supervisor for the position being filled should be selected to serve on the Search Committee. A member of the Faculty Affairs Committee should serve on each Search Committee to ensure that the process outlined here is followed.

The Director will draft or delegate the drafting of the job advertisement in consultation with the Search Committee and other faculty as appropriate. As the Faculty Affairs Committee recommends initial rank of appointment to the Director based upon the criteria in this document, rank should not be included in the initial job advertisement. The Search Committee shall meet with the Director so that the Director can set his/her expectations for the committee. It is the responsibility of the Chair to serve as the contact person for communication with the applicants during the search process. Search committee members should only contact applicants with the approval of the Chair. The UAB Equal Opportunity Policy as outlined in the UAB Faculty Handbook & Policies should be followed in all job searches in consultation with the LHL Affirmative Action Officer. All applications, regardless of their method of delivery, should be forwarded to and opened by the Chair of the Committee or the appointed designee.

The applicant pool for all faculty positions will remain confidential. Library faculty and staff (not appointed to the search committee) will have the opportunity to review the application materials of only those candidates selected for interview.

For specific duties and responsibilities see the "Guidelines and Procedures for the Recruitment of Faculty" in the Faculty Affairs public folder.

B. Committee Resolution and Conclusion

1. After the interview(s) are held, the Search Committee will meet to discuss the evaluations.
2. The Search Committee will make a recommendation to the Director in accordance with UAB hiring practices and government regulations.
3. The Director will then select a candidate for the position.
4. The Director consults the Faculty Affairs Committee to determine the recommended appointment rank (see Criteria for Promotion to Specific Ranks

section for more information) and prepares a letter of offer to be approved by the Provost and the President of UAB.

5. This letter of offer is then sent to the candidate and once accepted, a Certificate of Faculty Appointment is issued by the President.
6. The Director will notify all other candidates interviewed of the outcome of the search process.
7. If the candidate declines the offer, the Director in consultation with the Search Committee selects another candidate or initiates a new search.

The date of hire shall define the beginning of time in rank if it is October 1. If the appointment date comes after October 1, the October 1 which next follows shall define the beginning of time in rank.

GENERAL ASSESSMENT CATEGORIES

All faculty are assessed on the basis of three broad categories: faculty performance, scholarly activity, and service. An individual will be judged by these criteria in proportion to their relative importance to each academic rank, the type of appointment held by the faculty member, and to the program priorities of the appointing unit.

A. Effectiveness as a Librarian (2.5.4 – UAB Faculty Handbook & Policies)

Effectiveness as a Librarian is defined as a demonstration of one's competence and knowledge in support of the missions of the Library and the institution. Competence and achievement within the Library will be judged, generally, on consistency of performance, understanding of developments in library practice, growth in subject expertise, effectiveness of judgment, effectiveness of administrative leadership, creative ability in problem solving, ability to work well with others, and ability to relate his/her functions to the goals of the Library and to UAB.

"The health sciences librarian provides leadership and expertise in the design, development, and ethical management of knowledge-based information systems that meet the information needs and obligations of the institution." (From: "A Code of Ethics for Health Sciences Librarianship," see Appendix E).

Effectiveness as a Librarian can be demonstrated by:

- fulfillment of primary responsibilities as defined in the job description
- effective collaboration in creative problem solving
- organization and prioritization of goals, projects, and tasks
- strategic planning for management of library resources
- flexibility in adapting to changes within the profession or institution
- an understanding of the library as a whole and the relationship of their activities to the mission of the Library

Of the three (3) broad criteria areas, the quality of the individual's achievements in this area is crucial to the overall assessment of the individual's qualifications.

B. Scholarly Activities (2.5.2 – UAB Faculty Handbook & Policies – Effectiveness in Scholarly Activities)

Although scholarly work takes many forms, including research and other creative activities, a candidate's academic achievement will be evaluated in terms of the quality of:

- publications in professional journals or books
- reports to professional newsletters or organizational publications
- books published
- grant awards
- papers presented at professional conferences
- exhibits or poster sessions presented at a professional meeting
- editorial activities involving significant intellectual input
- peer-review activities (e.g. grant applications, paper submissions, conference presentations, external reviewer for promotion or tenure)
- scholarly honors and awards
- level of membership in the Academy of Health Information Professionals or equivalent and relevant organization
- development and teaching a continuing education course; term-length course for academic credit; guest lecturer for an academic course; service on a thesis review committee
- relevance and amount of continuing education courses taken

The quality of the individual's scholarly approach, capacity for independent thought, originality, and products of research must be addressed.

C. Service (2.5.3 – UAB Faculty Handbook & Policies – Effectiveness in Service Activities)

Service functions can be those performed for the Library, UAB, the Birmingham community, the state of Alabama, and regional, national, or international groups.

Service may include such activities as:

- constructive membership on a LHL committee or campus-wide UAB committee
- participation in programs, seminars, or workshops which inform the public about LHL or UAB programs, goals or information resources
- participation in UAB sponsored programs (Volunteer Corps, Campus Watch, Higher Education Day, IT Day, etc.)
- active and meaningful membership in UAB-sponsored or community fund raising drives for charitable organizations
- membership in and significant contribution to professional and scholarly organizations
- noteworthy participation in library and other professional meetings and conferences
- UAB approved faculty consultation within or outside UAB
- outstanding achievement or promise as evidenced by awards and fellowships

Factors that may show noteworthy achievement include level, extent, and quality of participation.

CRITERIA FOR APPOINTMENT/PROMOTION TO SPECIFIC RANKS

I. INSTRUCTOR [note minimum to be appointed – cumulative at all levels]

The minimum criteria for the initial appointment of an individual to an Instructor position are:

1. A master's degree from a library school accredited by the American Library Association
or
A master's degree in an area related to the individual's work assignment.
2. Potential faculty performance as a librarian, administrator, researcher, or educator as judged on the basis of letters of recommendation and personal interviews.
3. Evidence of or potential for scholarly competence and service activity as judged on the basis of documents in the application package
4. Successful experience (except in the case of entry-level) as judged on the basis of recommendations. Training or prior experience in health sciences librarianship shall be considered highly desirable in assessing the strengths of candidates for library faculty positions.
5. Desirable professional qualities as judged on the basis of a personal interview and recommendations.

Upon hire, the Director's office will notify instructors of the date by which they need to apply for promotion using the chart outlined in Appendix F. Faculty at the Instructor level shall have at least three years professional library experience before seeking promotion. By the end of the third normalized year, instructors are required to apply for promotion.

II. ASSISTANT PROFESSOR

An assistant professorship may be awarded to individuals who have the potential to make significant academic contributions. Initial appointments at the rank of Assistant Professor at UAB shall be for two (2) years and may be renewed. Persons may be appointed at this rank at the time of initial appointment. Appointment to the rank of Assistant Professor normally requires a minimum of three (3) years relevant professional experience. Promotion to the rank of Assistant Professor normally requires a minimum of three (3) years at the rank of Instructor.

- A. Effectiveness as a Librarian: meets or exceeds expectations overall in the following activities
 - 1. Performance of primary responsibilities (as defined in the job description)
 - 2. Collaboration in creative problem solving
 - 3. Organization and prioritization of goals, projects and tasks
 - 4. Strategic planning for management of library resources
 - 5. Flexibility in adapting to changes with the profession or institution
 - 6. Understanding of the library as a whole and the relationship of their activities to the mission of the library.

Faculty must meet or exceed expectations in criterion number one (1). A total of four (4) criteria are required.

- B. Scholarly Activity: both quality and quantity will be considered.
 - 1. Publications, presentations, and exhibits on at least a state or local level
 - 2. Reports, editorial activities, grant awards, and scholarly honors or awards on at least a state or local level
 - 3. Original programs or manuals applicable to library operations beyond the departmental level
 - 4. Academy of Health Information Professionals on at least a provisional member level or equivalent membership
 - 5. Continuing education efforts (taking/teaching) or completed academic study in a field related to duties and responsibilities

Faculty must meet or exceed expectations in criterion number one (1), or number two (2), or number four (4) above. A total of three (3) criteria are required.

C. Service

1. Constructive membership on LHL committees
2. Constructive membership on UAB committees
3. Participation in UAB sponsored or community programs
4. Participation in professional associations

Faculty must meet or exceed expectations in criterion number one (1) and number four (4) above.

III. ASSOCIATE PROFESSOR

The individual holding this rank should have demonstrated the ability to make significant contributions in health science librarianship. Such contributions should be of high quality and recognized as such outside the state. Further, the individual should show promise of continued professional growth. Appointment to the rank of Associate Professor normally requires a minimum of six (6) years relevant professional experience. Promotion to this rank is normally awarded only after at least three (3) years of service at the Assistant Professor level.

A. Effectiveness as a Librarian: meets or exceeds expectations overall in the following activities

1. Performance of primary responsibilities (as defined in the job description) at an overall superior level
2. Collaboration in creative problem solving in a leadership capacity
3. Organization and prioritization of goals, projects and tasks
4. Strategic planning for management of library resources
5. Flexibility in adapting to changes with the profession or institution
6. Understanding of the library as a whole and the relationship of their activities to the mission of the library.

Faculty must meet or exceed expectations in criterion number one (1). A total of four (4) are required.

B. Scholarly Activity: both quality and quantity will be considered.

1. Publications, presentations, and exhibits on at least a regional or national level; peer-reviewed activities shall carry more weight
2. Reports, editorial activities, grant awards, and scholarly honors or awards on at least a regional or national level
3. Original programs or manuals applicable to library operations beyond the departmental level
4. Academy of Health Information Professionals on at least a Senior level or equivalent membership
5. Continuing education efforts (taking/teaching) or completed academic study in a field related to duties and responsibilities

Faculty must meet or exceed expectations in criterion number one (1), or number two (2), or number four (4) above. A total of three (3) criteria are required. At least one publication or equivalent activity should be peer-reviewed.

C. Service

1. Leadership on LHL committees
2. Constructive membership on UAB committees
3. Participation in UAB sponsored or community programs
4. Leadership in professional associations

Faculty must meet or exceed expectations in criterion number one (1) and number four (4) above.

IV. PROFESSOR

This rank is for librarians whose professional performance and service have been consistently outstanding and whose prominence in their field reflects superior achievements. This position is the highest academic rank granted at UAB except for a limited number of University, Distinguished, or Endowed professorships. Appointment to the rank of Professor requires the demonstration of nationally recognized excellence in the conduct of health science librarianship and a minimum of ten (10) years relevant professional experience. Promotion to this level normally requires at least three (3) years as an Associate Professor.

A. Faculty Performance: exceeds expectations overall in the following activities

1. Performance of primary responsibilities (as defined in the job description) at an overall superior level
2. Collaboration in creative problem solving in a leadership capacity
3. Organization and prioritization of goals, projects and tasks
4. Strategic planning for management of library resources
5. Flexibility in adapting to changes with the profession or institution
6. Understanding of the library as a whole and the relationship of their activities to the mission of the library.

Faculty must meet or exceed expectations in all criteria above.

B. Scholarly Activity: both quality and quantity will be considered.

1. Publications, presentations, and exhibits on a national level; at least some of which must be in peer-reviewed publications
2. Reports, editorial activities, grant awards, and scholarly honors or awards on at least a national level
3. Original programs or manuals applicable to library operations beyond the departmental level
4. Academy of Health Information Professionals on at least a Distinguished level or equivalent membership
5. Continuing education efforts with a focus on teaching or completed academic study in a field related to duties and responsibilities

Faculty must meet or exceed expectations in criterion number one (1) above. Faculty must also meet or exceed expectations in criterion number two (2) or number four (4) above. A total of three (3) criteria are required.

C. Service

1. Leadership on LHL committees
2. Constructive membership on UAB committees
3. Leadership in UAB sponsored or community programs
4. Leadership in multiple professional associations

Faculty must meet or exceed expectations in criterion number one (1) and number four (4) above.

PROCEDURES FOR PROMOTION

See also 2.6 – UAB Faculty Handbook & Policies– Procedures for Faculty Appointments, Reappointments, Promotions, and Awards of Tenure.

I. General Procedures

1. Normally, a person becomes a candidate for promotion after discussion with his/her supervisor and/or the Director. Each candidate (referred to hereafter as the candidate) shall submit a letter of request for promotion to the Director by **January 1**. The candidate shall prepare his/her self-evaluation (see Appendix A) based on the items in the "Self-Evaluation Checklist for Librarians"
2. Questions concerning the preparation of the promotion review packet by the candidate can be addressed to his/her supervisor.
3. The candidate will submit the names of at least three (3) references to the Director by **January 15**. Three of these references must be from outside of the institution and qualified to review the faculty members' qualification. (See 2.5 -- UAB Faculty Handbook & Policies). Reference letters for the candidate's case will be requested by the Director (see Appendix C).
4. The candidate will forward the promotion packet (see section IV below) to the Director by **February 15**.
5. The candidate shall also submit a copy of his/her self-evaluation to the Unit Head by **February 15**. The supervisor shall complete the annual evaluation by **March 1** so that it shall be added to the promotion packet.
6. The Director forms the Faculty Promotion Committees and designates a time and place for a meeting by **March 1**.
7. The Director will bring copies of all packet(s) to distribute to all members of the committee. The Director will be responsible for seeing that all members of the committee(s) have copies of the LHL Faculty Policies and Procedures. A Chair is chosen by the committee members as described below in Section II. C. Arrangements will be made for the next meeting to review each case.
8. Each Faculty Promotion Committee meets and reviews each case presented to that committee. A report is prepared stating each Faculty Promotion Committee's recommendations and the reasons for its recommendations. The Chair transfers the documents with the recommendations back to the Director by **April 1**.

9. The report is prepared with the recommendation and submitted to the Director by **April 15**.
10. The Director will make a recommendation for each candidate after reviewing the report of the Faculty Promotion Committee by **May 1**.
11. The Director will inform each candidate in writing of the action taken by **May 1**. The candidate may request a meeting with the Director and the Faculty Promotion Committee to discuss any questions involving the action. Efforts are made to resolve any problems at this time. The Director is available to answer questions, explain policies, hear complaints and offer suggestions for resolving difficulties as they occur. If the candidate wishes to appeal the recommendation, the Director will meet with the candidate.
12. When a final decision on the recommendation has been reached by the Director, the completed files will be forwarded to the Provost by May 1.
13. All final personnel records and documents relating to applicants will at all times be kept in the office of the Director.
14. Appeals of a negative promotion decision shall be initiated, in writing, within thirty (30) calendar days by communication with the Director or Provost, depending on the level at which the negative decision occurred. The appeals process follows the guidelines as outlined in 2.6.11 UAB Faculty Handbook & Policies.
15. If an Assistant or Associate Professor is denied a promotion, the faculty member may reapply the following year.

II. Faculty Promotion Committee

A. Composition of Faculty Promotion Committees

These committees are advisory to the Director and are responsible for reviewing and recommending all persons for promotion in the peer review process. Faculty Promotion Committees will consist of the three (3) LHL Faculty Affairs Committee members unless they are ineligible and two (2) other faculty members from UAB appointed by the Director. The Affirmative Action Officer should serve on all Promotion Committees. The Affirmative Action Officer may serve this function as a regularly elected member of the committee, or may be added as an ex officio sixth member of the committee. In the latter case, the Affirmative Action Officer would be a non-voting member. The Director is encouraged to use these

appointments to ensure diversity in representation on the committee. (Members of the FAC are considered elected members on the Promotion Committee.)

Individuals are ineligible to serve on this Promotion Committee for any of the following reasons:

- rank below that to which an individual under consideration is to be promoted;
- in cases in which the member of the FAC is being considered for promotion
- or in other cases of potential conflict of interest such as when a member of the Promotion Committee has close personal ties to a candidate being considered. Potential conflict of interest may be reported to and addressed by the FAC.

If a FAC committee member is not eligible, a replacement from within the library will be elected by the faculty to ensure that the majority of the committee members are elected. If no one from within the library is eligible, an outside faculty member will be chosen at the Director's discretion.

When possible, one Promotion Committee will review all candidates for promotion in a given year. Should the Promotions Committee not comply with the eligibility requirements specified above for all candidates, an additional committee(s) shall be formed. The additional committee(s) will meet the eligibility requirements for the remaining candidate(s).

If, for any reason, insufficient LHL internal faculty at or above the rank being considered for promotion are available, additional committees should be formed. These committees shall be composed of a minimum of three (3) UAB faculty members at or above the rank being considered and two (2) non-voting LHL representatives from the highest ranks available. The majority of the voting committee members must be elected by the LHL faculty.

Special election procedures will be determined each year by the Lister Hill Library Faculty Affairs Committee, as needed.

B. Duties of the Faculty Promotion Committee

The Faculty Promotion Committee will be responsible for reviewing and evaluating all pertinent records and documents for candidates who are being considered for promotion. Each Faculty Promotion Committee shall have the responsibility for reviewing these records, writing recommendations based on the documentation, and drafting a report of its recommendations to the Director.

The Faculty Promotion Committee shall convene in private in a place where the confidential nature of its assignment will remain secure. The Director will distribute the promotion review packet(s).

The Director will be responsible for seeing that all members of the committee have copies of the "Procedures for Promotion" and the section of this document that deals with the criteria for appointment and promotion. The Chair will also see that the confidentiality of all records examined is preserved and that the Faculty Promotion Committee carries out its duties with the greatest possible care and dispatch.

Throughout the review process, the Faculty Promotion Committee will concentrate on the quality and significance of the faculty performance, scholarly activities, service and other items contained in the documentation. It is the determination of quality that will be the foundation of the Committee's recommendation.

The promotion review packet(s) will only include items germane to consideration of the individual's work performance or academic qualifications.

C. Chair of the Faculty Promotion Committee

Following the formation of the Faculty Promotion Committee(s), the Director will convene each committee for the purpose of electing a chair from the LHL members of the committee. Committee(s) that are composed of a majority of LHL voting faculty shall select a chair from among the LHL members of the committee. In cases where the committee is composed of UAB faculty and non-voting LHL faculty, the chair shall be selected from and by the non-LHL faculty.

III. Procedures of the Faculty Promotion Committee

- A. The Faculty Promotion Committee will convene as soon as possible after notice is given by the Director.
- B. All documents shall be placed in sealed envelopes marked "Confidential". It is strongly recommended that, except for scheduling meetings, no electronic distribution be used during the process.
- C. All original copies of personnel records, documents, etc., relating to a candidate's case shall be kept in the office of the Director.
- D. The Faculty Promotion Committee Chair will have the responsibility for seeing that all working documents of the committee including the promotion review packets, preliminary drafts of the committee's reports and recommendations are destroyed. Every effort must be made to destroy all electronic documents that may have been distributed.

- E. The Faculty Promotion Committee Chair is responsible for submitting the final report of the committee to the Director.

IV. Instructions to the Faculty Promotion Committee

- A. All reviews by the Faculty Promotion Committees shall be based on an objective appraisal of the candidate's performance based on the criteria section of this document. In each case, the committee evaluates the meaningfulness of the candidate's contribution and weighs the substance and quality of activities as represented in the documentation.

The committee is reminded that its only function is to advise and recommend. No decision of the committee is binding upon the Director or other UAB administrative officers.

- B. The documentation should be in sufficient detail so that an objective appraisal is possible. Documents lacking in detail are to be returned through the office of the Director for further amplification.

- C. The reports of the Faculty Promotion Committees may be drafted in the form of a memo. For each candidate considered, it will include the following items:

1. The name of the person reviewed.
2. The type of action recommended (Promotion or Denial).
3. A summary report or statement that gives the reasons for the Committee recommendation.
4. In cases involving a split decision, the minority opinion must be shown.
5. The names and signatures of the Committee members will be shown as the last item of the report, with the Chair so designated.

- D. Each Chair collects all of the documents, recommendations, etc., and places them in individual envelopes for each candidate, which are then sealed. All preliminary drafts, notes, etc. (both paper and electronic form) of the committee must be destroyed. This is an additional responsibility of the Chair.

- E. Each Chair transmits the review packet(s) to the office of the Director.

- F. Extreme discretion must be observed in review actions so that the confidentiality

of these matters is not violated. Extreme care must be exercised in selecting an appropriate site for the meetings of the committees.

- G. Violations of the confidentiality of these actions may subject the offending party or parties to strong disciplinary action.

V. Documentation

The recommendations made by the Faculty Promotion Committees must be based on an objective evaluation of the documents that are submitted to it in the review packet by the office of the Director. Neither oral nor written opinion nor information may be solicited from any source other than through the office of the Director. The packet of documents will be assembled when review action is initiated by the office of the Director. Materials should be assembled in accordance with instructions from the Provost's office. Documentation should always be hand carried in sealed envelopes marked "confidential" when moving between a committee and the office of the Director.

Cases which a committee feels are inadequately documented will be returned for amplification through the office of the Director.

The review packet should be in electronic format with files clearly identified as to content (e.g., evaluation, date; Curriculum Vitae; self-evaluation, time-in-rank; subsidiary documents [including hyperlinks where appropriate supporting job performance, scholarly research, and publications may be documented by links, pdfs, or book reviews], and professional/community service). The entire portfolio should be presented as a CD (Compact Disc) or other easily accessible electronic medium.

The review packet should consist of the following:

1. All previous evaluations of the candidate (which includes supervisor and self-evaluation) for time-in-rank.
2. An up-dated Curriculum Vitae (c.v. should reflect complete activities in the three assessment categories: job performance, scholarly research, and service).
 - (a) In one document, the candidate's summary of activities for time-in-rank.
 - (b) Thorough documentation for the three assessment categories should accompany the vitae and comprise the candidate's portfolio.
3. Supporting documents for time-in-rank:
 - (a) Evidence of effectiveness as a librarian (e.g. course instruction, curricular support sessions, bibliographic instruction, training sessions, academic course support, hands-on sessions, online instruction activities, tutorials, technical support, outreach to campus/community, etc.)
 - (b) Evidence of research activities not reflected in the vitae (e.g. works-in- progress, liaison activities documented through liaison contact letters).

- (c) Summary of additional service activities (internal and external to UAB) not reflected in the vitae (e.g. activities scheduled but pending).
- (d) Letters from reviewers external to UAB (minimum of three)
 - (1) The Director shall solicit letters from the references supplied by the candidate (see Appendix C). It is the Director's prerogative to solicit any additional letters of reference.

VI. Promotion Timetable

The recommended form letter in Appendix B also outlines the timetable for this process and give further instruction. See also Appendix D or the “LHL Faculty Portfolio Resources” (located in the LHL public folders).

<u>Target Date</u>	<u>Activity</u>
December 1	Director sends reminder letter to all faculty (Appendix B)
January 1	Candidate sends letter of intent to Director
January 15	Candidate supplies names of references to Director
February 15	Candidate delivers promotion packet to Director
February 15	Candidate delivers self-evaluation to supervisor
February 15	Letters of reference should be received by Director
March 1	Director forms Promotion Committee(s) and sets time to meet
March 1	Supervisor's current year annual evaluation written to the 3 criteria should be added to the promotion packet
April 1	Promotion Committee reports their recommendation to Director or reports their need for additional information
April 15	Final deadline for Promotion Committee to report their recommendation if additional data is needed.
May 1	Director will make recommendation to Provost, inform candidate of the decision and provide candidate with copy of signed Promotion Committee letter.
June 30	If not approved for promotion to the rank of Assistant Professor, Director will issue letter of non-reappointment.

ANNUAL REVIEW PROCESS

All library faculty with primary appointments undergo an annual review process not only to assess their overall performance and accomplishments during the past year but also to plan for future projects and goals. The Director initiates this process based on the timetable issued by the Provost's Office for the Academic Health Center. A recommended form letter from the Director to the faculty is given in Appendix B and outlines the timetable for this process. This timetable correlates to the one required in the promotion process.

This process first involves the preparation of a self-evaluation by the faculty member. This self-evaluation checklist is submitted to the faculty member's immediate supervisor. The supervisor then prepares a written evaluation which is given to the faculty member. If the faculty member is requesting a promotion in rank then this evaluation is written based on the specific criteria for that rank. The faculty member and supervisor meet to discuss the evaluation and develop goals for the upcoming year. The review packet and evaluation are then forwarded to the Director by the Unit Head. The Director will write an evaluation letter of the faculty member. The Director and faculty member will also meet to discuss the evaluation and goals.

A copy of the annual review packet consisting of the completed self-evaluation checklist, supervisor's evaluation, and Director's evaluation letters will be maintained in the Library Administrative Offices.

PROCEDURES FOR APPEALS AND GRIEVANCES

A. Appeals

Appeals are requests for a reconsideration of the judgment by a committee or administrative official that a faculty member should be denied reappointment or promotion. The appeals process follows the guidelines provided in Section 2.6.11 of the UAB Faculty Handbook & Policies.

B. Grievances

A faculty member with a grievance (other than appeals covered in Section 2.6.11 referenced above) should first seek an informal resolution within the organizational structure of the Library. If these informal channels fail to satisfy the faculty member, a written complaint should be filed through either the Unit Head or Director. If unable to obtain a satisfactory resolution, the faculty member may then request a resolution of the Provost and, upon such request, the Provost shall initiate the grievance procedure described in Appendix A of the UAB Faculty Handbook & Policies (See also Section 2.9).

PROCEDURES FOR TERMINATION OF EMPLOYMENT

A. Resignation

Acceptance of a full-time faculty appointment is a commitment to the time period designated in your contract. When circumstances do not permit the completion of such a commitment, UAB may agree to an earlier resignation with a thirty (30) day written notice.

B. Termination for Cause

Employment of a tenured faculty member shall not be terminated nor shall the employment of a non-tenured faculty member be terminated during the term of an appointment without cause. Cause for termination is defined as gross professional misconduct or serious failure of a faculty member to discharge his or her obligations to the University. The guidelines for termination for cause are outlined in Section 2.7.2 of the UAB Faculty Handbook & Policies.

C. Termination Due to Bona Fide Financial Exigency, Bona Fide Financial Crisis or Academic Unit Closure

The procedures for termination due to bona fide exigency are outlined in Section 2.7.3 of the UAB Faculty Handbook & Policies.

D. Retirement (2.8 – UAB Faculty Handbook & Policies)

There is no compulsory retirement age for faculty. A member of the Teacher's Retirement System of Alabama is eligible for benefits at any time after acquiring twenty-five (25) years of creditable service or, with ten (10) years of service, at age sixty or thereafter.

E. Non-reappointment (see UAB Faculty Handbook & Policies, Section 2.6.4.3)

When a decision against reappointment is made, the faculty member shall be informed of the decision and the reasons for non-reappointment, in writing, by the Director in accordance with the following standards:

1. During the first full year of service, a non-tenure-earning faculty member must receive a minimum of three (3) months' notice of non-reappointment.
2. After one or more full years of service to UAB, a faculty member must receive twelve (12) months' notice that his or her appointment will not be renewed.

As noted in Section 2.6.11 of the UAB Faculty Handbook & Policies, notice of non-reappointment must be appealed to the Provost within thirty (30) calendar days of the notice of non-reappointment.

Although an individual faculty member may meet the criteria for reappointment, a decision to deny reappointment may be based on program factors not prevalent or predictable at the time of the original appointment. It shall be the responsibility of the Director to ensure the earliest possible notification of faculty who will be affected by such changes, but in no case shall notice be less than that specified above.

A non-reappointment notice of one (1) year shall be given to an Instructor who has not been granted a promotion to Assistant Professor by the completion of the fourth (4th) year based on a normalized October 1st starting date.

PROCEDURES FOR REVISION OF THIS DOCUMENT

This document should be reviewed periodically and it should conform to the policies and procedures outlined in the current UAB Faculty Handbook & Policies. When a new UAB Faculty Handbook & Policies is revised, the LHL Faculty Policies and Procedures will also be examined and revised accordingly. Suggestions for changes to this document should be directed to the Chair or any member of the LHL Faculty Affairs Committee who are responsible for drafting any revisions. Proposed revisions may be presented at any regular or special meeting of the LHL faculty.

All faculty with regular appointments shall be notified in writing concerning the revisions which are to be considered at least ten (10) working days prior to the meeting. For revisions to pass, there must be a quorum present; a two-thirds vote is required for approval. After approval by the faculty, the revisions shall be forwarded to the Director who shall make a decision within sixty (60) days concerning the revisions and shall notify the faculty in writing concerning the reasons for the decision.

If the revisions are approved, the Director shall forward the revised document to the Provost for final approval. The revised document shall become effective after approval of the Provost.

Appendices

(Note: LHL Appendices are meant to refer to LHL specific items and in no way supersede, amend, or alter in any way current appendices A, B, or C in the UAB Faculty Handbook & Policies.) These documents are provided for reference only. They are not part of the preceding policies and procedures. Therefore, there is no need for changes in appendices to go through the formal approval process.

Annual Faculty Evaluation
[Year]

[Name]
[Rank/Title]
[Date]

I. FACULTY PERFORMANCE (*All areas of Faculty Performance ARE mandatory*)

**Give examples of accomplishments or activities for each area and rank performance as:
Needs Improvement, Meets Expectations, or Exceeds Expectations**

A. Performance of primary responsibilities (as defined in job description)

Performance: _____

B. Collaboration in creative problem solving

Performance: _____

C. Organization and prioritization of goals, projects and tasks

Performance: _____

D. Strategic planning for management of library resources

Performance: _____

E. Flexibility in adapting to changes with the profession or institution

Performance: _____

F. Understanding of the library as a whole and the relationship of their activities to the mission of the library

Performance: _____

SUMMARY OF FACULTY PERFORMANCE:

Performance: _____

GOALS FOR FACULTY PERFORMANCE:

II. SCHOLARLY ACTIVITY *(All areas of Scholarly Activity are NOT mandatory)*

Give examples of accomplishments or activities for each area and rank performance as: Needs Improvement, Meets Expectations, or Exceeds Expectations

A. Publications, presentations and exhibits

Performance: _____

B. Reports, editorial activities, grant awards, and scholarly honors or awards

Performance: _____

C. Original programs or manuals applicable to library operations

Performance: _____

D. Academy of Health Information Professionals or equivalent membership

Performance: _____

E. Continuing Education efforts or completed academic study

Performance: _____

SUMMARY OF SCHOLARLY ACTIVITY

Overall performance: _____

GOALS FOR SCHOLARLY ACTIVITY:

III. SERVICE

(All areas of Service are NOT mandatory)

**Give examples of accomplishments or activities for each area and rank performance as:
Needs Improvement, Meets Expectations, or Exceeds Expectations**

A. Constructive membership on LHL committees

Performance: _____

B. Constructive membership on UAB committees

Performance: _____

C. Participation in UAB sponsored and community programs

Performance: _____

D. Participation in professional associations

Performance: _____

SUMMARY OF SERVICE:

Overall performance: _____

GOALS FOR SERVICE:

IV. Summary Statement

Written by:

Name Date

Reviewed by:

Name Date

Appendix B. Annual Review Process Letter

TO: All LHL Faculty
FROM: Name of Director, Director
DATE: December 1, <year>
SUBJECT: Annual Review Process

Dear Faculty:

This is to advise you that the annual review process will be initiated in the immediate future. Therefore, I would like to ask each of you to update your curriculum vitae; review your job description; and prepare a self-evaluation based on the criteria found in the Faculty Policies and Procedures. Individuals who wish to be considered for promotion need to discuss this issue with their Unit Head/Supervisor. Please refer to the Faculty Policies and Procedures for specific details.

The timetable for this should be as follows:

1. A letter of request for promotion should be turned in to me by **January 1**.
2. The names of references for promotion cases should be turned in to me by **January 15** so that I can draft the appropriate letters to these individuals.
3. For those being recommended for promotion, all documentation should be in my office by **February 15**.
4. All documentation for those individuals who are not being considered for promotion should be in my office by **April 1**.
5. Completed packets for those being recommended for promotion will be submitted to the Office of the Provost by **May 1**.
6. The evaluation process, including discussions with the Director, will be completed by the end of May.

This memorandum is also intended to alert Unit Heads to the fact that they must write evaluations of each faculty member under their supervision and that these evaluations along with the self-evaluations need to be discussed with the individual faculty member prior to submitting the packets to my office.

If there are any individuals who are being recommended for promotion, a Faculty Promotion Committee will be formed by **March 1** with a report of recommendation to me by **April 1**.

Sincerely,

Name of Director
Director

Appendix C. Reference Letter for Promotion

Confidential

January 15, <year>

Name of Reference

Address

Dear (name of reference):

The Lister Hill Library of the Health Sciences is in the process of performing evaluations on faculty for promotion. (Name of applicant) has applied for promotion to the rank of (title of rank). The purpose of this evaluation will be to form a substantive appraisal of his/her performance since his/her appointment in the Library and to assess his/her future potential for UAB and the Library.

As part of the review process, candidates are encouraged to submit the names of people who may be knowledgeable about their work and contributions and who could write a letter of evaluation. (Name of applicant) has listed your name as a possible reference.

Evaluations are performed in accordance with the UAB Faculty Handbook & Policies and in accordance with the Library's own criteria and procedures as set down in our internal review document. Candidates are evaluated in terms of quality of performance and their effectiveness in the following areas:

1. Faculty Performance
2. Scholarly Activities
3. Service

For your convenience, the "Specific Criteria for Appointment and Promotion" are enclosed. Any comments which you feel appropriate will be helpful in forming a recommendation in his/her case. The material you submit will only be reviewed by the LHL Faculty Promotion Committee which includes library as well as non-library faculty representation. The Committee will be considering (applicant's) application beginning in March. I will need to receive your response no later than February 15. Please feel free to call me at (205) 934- ____ should you have any questions pertaining to our criteria or procedures.

Thank you for your assistance.

Sincerely,

Name of Director

Title

encl.

Appendix D. LHL Faculty Portfolio Resources (see also LHL public folders)

I. General Advice and Effective Habits

1. Carefully read the entire *LHL Faculty Policies and Procedures*, and make a photocopy of the portion of the document that specifies the requirements for the appropriate step in promotion. See LHL public folder, “Faculty Affairs Committee,” document title, “FAC APT.doc.”
2. Map out the timeline milestones on a personal calendar. See calendar below.
3. Participate in the sessions organized by the LHL Faculty Affairs Committee at which faculty members discuss promotion portfolios and members of recent promotion committees share experiences.
4. As soon as possible and throughout your career, cultivate professional relationships with colleagues outside the library, on the UAB campus, in the state, and nationally. Relationships come through service in professional organizations, presentations, publications in peer-reviewed journals, etc. These colleagues will provide a pool from which to select names for letters of reference for promotion portfolios. Non-UAB and nationally known professionals are especially valuable.
5. Demonstrate steady progress throughout the time in rank rather than trying to catch up with service and publications during the final year before a promotion decision is due. Use the annual meetings with supervisor to set goals and document progress toward goals on the Learning Plan.
6. Volunteer for professional committees related to job responsibilities. Keep records of all committees and professional positions for which you volunteered.
7. A faculty member coming up for a decision may ask other faculty members to review the promotion packet prior to submission. A list of recently promoted LHL faculty will be available from LHL Administration.
8. Make a habit of collecting everything related to professional contributions and activities. As you attend meetings, conferences, workshops, immediately file certificates, thank you letters from officers, meeting programs showing presentations. These will also be helpful as you compile information for annual reports and AHIP certification. If you can develop the habit, type accomplishments during the year into an activity log or directly into your curriculum vitae.
9. Keep screen shots of Web pages. Gather links or pdfs of articles available online.
10. Sources of other overlooked activities may include calendars, meeting minutes, and email folders.
11. **Caveat:** Promotion decisions are made by faculty committees, the library director, provost and president. There are **no guarantees** that all those who follow these guidelines will be promoted. What may have been successful in the past may not necessarily work in the future.

Calendar/Timeline

Target Date Activity

June 30th

**(of first full year of
appointment as
Instructor):**

Candidate should have joined relevant professional associations and documented efforts to volunteer for service on association committees, chapters, sections, etc.

Candidate should be serving on library committees beyond those directly required by his/her position.

Candidate should have volunteered to serve on campus committees.

Candidate should have identified topic for publication or be in research project team working toward a publication.

Candidate should have taken at least one relevant CE course.

Candidate should have applied for membership in AHIP. (This may not apply to faculty in Historical Collections.)

June 30th

**(of 2nd full year of
appointment as
Instructor):**

Candidate should be serving the profession in some capacity at the statewide or regional or national level.

Candidate should be contributing significantly to LHL committees.

Candidate should have made progress toward a publication.

January 1

**(of 3rd full year of
appointment as
Instructor):**

Candidate should meet the criteria given in the Faculty Policy and Procedure Manual regarding promotion from Instructor to Assistant Professor.

December 1

Director sends reminder letter to all faculty to let him know by January 1 of their intention to go up for promotion.

January 1

Candidate sends letter of intent to Director

January 15

Candidate supplies names of references to Director who will request letters of reference. Candidate must include at least three non-UAB references. According to the Provost's Office, retired UAB faculty may not serve as "non-UAB" references.

February 15

Candidate delivers promotion packet to Director

February 15	Candidate delivers self-evaluation (refer to “Self-Evaluation Checklist for Librarians” in Appendix A of <u>LHL Faculty Policies and Procedures-LHLFPP</u>) to supervisor
February 15	Letters of reference should be received by Director
March 1	Director forms Promotion Committee(s) and sets time and location to meet. In addition, Director will be responsible for providing copies of all packets as well as seeing that all committee members have copies of the <u>LHL Faculty Policies and Procedures</u> . A chair is chosen by the committee members as described in section I.C of LHLFPP. Arrangements will be made for the next meeting to review each case.
March 1	Supervisor's current year annual evaluation written to the three criteria should be added to the promotion packet
April 1	Promotion Committee reports recommendation to Director or reports need for additional information
April 15	Final deadline for Promotion Committee to report recommendation if additional data is needed.
May 1	Director will make recommendation to Provost, inform candidate of the decision, and provide candidate with copy of signed Promotion Committee letter.
June 30	If an instructor is not approved for promotion to the rank of Assistant Professor, Director will issue letter of non-reappointment and final contract. If you have been at UAB for more than one year, you will have a one year notice of termination. Appeals of a negative promotion decision shall be initiated, in writing, within thirty (30) calendar days by communication with the Director or Provost, depending on the level at which the negative decision occurred. The appeals process follows the guidelines as outlined in 2.6.11 <u>UAB Faculty Handbook & Policies</u> .
October	Approval by UAB President. Successful candidate completes acceptance form

Appendix E. A Code of Ethics for Health Sciences Librarianship

Goals and Principles for Ethical Conduct

The health sciences librarian believes that knowledge is the sine qua non of informed decisions in health care, education, and research, and the health sciences librarian serves society, clients, and the institution by working to ensure that informed decisions can be made.

Society

The health sciences librarian promotes access to health information for all and creates and maintains conditions of freedom of inquiry, thought, and expression that facilitate informed health care decisions.

Clients

The health sciences librarian works without prejudice to meet the client's information needs.

The health sciences librarian respects the privacy of clients and protects the confidentiality of the client relationship.

The health sciences librarian ensures that the best available information is provided to the client.

Institution

The health sciences librarian provides leadership and expertise in the design, development, and ethical management of knowledge-based information systems that meet the information needs and obligations of the institution.

Profession

The health sciences librarian advances and upholds the philosophy and ideals of the profession.

The health sciences librarian advocates and advances the knowledge and standards of the profession.

The health sciences librarian conducts all professional relationships with courtesy and respect.

The health sciences librarian maintains high standards of professional integrity.

Self

The health sciences librarian assumes personal responsibility for developing and maintaining professional excellence.

-- Adopted by the voting membership at the annual meeting
of the Medical Library Association in May 1994.

Appendix F. Instructor Progress Toward Promotion – Key Dates Chart

Name	
Date of Hire	
Date by which Request for Promotion Must be Made	
Termination date if Promotion is Not granted	