

UCSF LIBRARY  
**LIBRARIAN REVIEW PROCESS**  
**TIMELINE and PROCEDURES**

Timeline	Action
1 <sup>st</sup> week of August	<b>Academic HR Generalist:</b> <ul style="list-style-type: none"> <li>• Submits advancement review eligibility list for all Librarians to the University Librarian and CAPA Chair.</li> </ul>
1 <sup>st</sup> and 2 <sup>nd</sup> week of August	<b>CAPA Chair:</b> <ul style="list-style-type: none"> <li>• Checks the list for completeness/accuracy and advises HR Shared Services of any corrections.</li> <li>• After validating the review list, the CAPA Chair will alert HR Shared Services to move forward.</li> </ul>
Mid August	<b>Academic HR Generalist:</b> <ul style="list-style-type: none"> <li>• Creates advancement review packets in Advance for eligible Librarians and emails all members of the Librarian series regarding their eligibility for on-time advancement review.</li> <li>• Sends emails to Librarians who are eligible for on-time review during a given cycle to inform them of their eligibility, including a list of required materials for the applicable review and a link to the Librarian Review Process Timeline for reference.</li> <li>• Sends emails to Librarians not eligible for on-time review during a given cycle to inform them of their lack of eligibility.</li> <li>• Review Initiators are copied on the above emails.</li> </ul>
Late August	<b>Review Initiator:</b> <ul style="list-style-type: none"> <li>• Meets with Reviewee(s) to discuss impending review and options for personnel actions.</li> <li>• Ensures that Reviewee(s) are adequately informed about the review process.</li> </ul>
September	<b>Reviewee:</b> <ul style="list-style-type: none"> <li>• Updates Advance CV and copies that CV into the Advance review packet.</li> <li>• If applicable (i.e., for promotion, off-cycle, and/or career status reviews), provides to the Review Initiator names of persons to evaluate the Reviewee's qualifications or performance. May provide to the Review Initiator names of persons who might not objectively evaluate the Reviewee's qualifications or performance; such shall be included in the review record.</li> <li>• Upon Review Initiator concurrence, enters names and contact information of evaluators into the Advance System, or provides names and contact information by email to Academic HR Generalist.</li> </ul>
October	<b>Academic HR Generalist:</b> <ul style="list-style-type: none"> <li>• Confirms that Advance CV has been copied into the Advance review packet, and if applicable, solicits references evaluating the Reviewee through the Advance system.</li> <li>• Will check progress on each packet and notify Reviewee of needed items.</li> </ul>

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November	<p><b>Academic HR Generalist</b></p> <ul style="list-style-type: none"> <li>• Reviews packet for completion and, if needed, requests additional information from Reviewee and/or Review Initiator.</li> <li>• Notifies the Review Initiator when the ‘Chair Letter’ page in the Advance review packet should be drafted.</li> </ul>
December	<p><b>Review Initiator:</b></p> <ul style="list-style-type: none"> <li>• Reviews the completed record and enters evaluation into the ‘Chair Letter’ page of the Advance packet.</li> <li>• Notifies Academic HR Generalist when the Chair Letter is complete.</li> </ul>
<p>January</p> <p><b>Goal: ROUTE TO Office of Academic Affairs by 4<sup>th</sup> Friday of January</b></p>	<p><b>Academic HR Generalist:</b></p> <ul style="list-style-type: none"> <li>• Reviews packet a final time for completion.</li> <li>• Requests routing exception from the Office of Faculty and Academic Affairs.</li> </ul> <p><b>Office of Faculty and Academic Affairs</b></p> <ul style="list-style-type: none"> <li>• Enables routing exception in Advance so that HR Shared Services may send notice to Reviewee to begin the 7-day period in which the Reviewee may review all of the redacted documents within the review packet.</li> </ul> <p><b>Reviewee:</b></p> <ul style="list-style-type: none"> <li>• During the 7-day review period, reviews the packet materials, completes the Document Checklist and Certification Statement, and sends the documents to Academic HR Generalist to upload to packet.</li> <li>• If needed, may request extension of time to review.</li> <li>• If desired, may upload a statement in response to the contents of the review packet.</li> </ul> <p>Note: At the conclusion of 7-day review period, the review packet is automatically routed by the Advance system to the Office of Faculty and Academic Affairs.</p>
February - June	<p><b>Office of Faculty and Academic Affairs:</b></p> <ul style="list-style-type: none"> <li>• Reviews packet for completion.            [If found to be incomplete, will return packet to and request additional information through the Academic HR Generalist. Once the packet is complete, the Academic HR Generalist will ensure that a new 7-day notice is provided to the Reviewee via the Advance system, allowing the Reviewee to review any updates to the file and attach a statement, if preferred.]</li> <li>• Consults with the CAPA Chair to identify which CAPA members should be assigned to a given review.</li> <li>• Provides the CAPA members for a given review with direct access to all of the materials included in the Advance review packet.</li> <li>• Solicits the CAPA members for their recommendation letter.</li> <li>• Once received, uploads the CAPA recommendation letter to the Advance review packet.</li> </ul>

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	<p><b>CAPA:</b></p> <ul style="list-style-type: none"> <li>• Evaluates review record.</li> <li>• Submits confidential letter of recommendation to the Office of Faculty and Academic Affairs.</li> <li>• Dissenting CAPA members may include a confidential letter representing their perspective.</li> <li>• Each CAPA member is responsible for self-disqualification in instances of concern regarding objectivity and/or possible conflict of interest.</li> </ul> <p><b>University Librarian:</b></p> <ul style="list-style-type: none"> <li>• Evaluates review record.</li> <li>• Certifies recommendation in the ‘Dean Letter’ page in the Advance review packet.</li> </ul> <p><b>Vice Provost for Academic Affairs:</b></p> <ul style="list-style-type: none"> <li>• Evaluates review record.</li> <li>• Certifies the ‘Decision’ page in the Advance review packet.</li> </ul>
<p><b>Upon Decision (by July 1)</b></p>	<p><b>Office of Faculty and Academic Affairs:</b></p> <ul style="list-style-type: none"> <li>• Sends email notification regarding the Decision from the Advance system to the Reviewee.</li> <li>• The University Librarian, Review Initiator, and HR Shared Services will be copied on the email notification.</li> </ul>

Notes:

*Timeline dates are target dates for all parties and may progress more quickly if steps are completed earlier than target deadlines. Failure of materials to be completed within the expected timeframe may result in a delayed review; in such cases, please contact HR Shared Services regarding any possible impact on the review timeline.*

*Librarian reviews are governed by the UC-AFT Professional Librarians (LX) Contract, Articles 4 & 5.*

*Campus procedural documents for Librarian review can be found under the Additional Procedural Documents section of the following webpage:*  
<https://facultyacademicaffairs.ucsf.edu/academic-personnel/academic-review-and-advancement>.