

# Academic Review Workshop

Fall 2024

*Hosted by*

LAUC-B Committee on Appointment, Promotion & Advancement  
(CAPA)

# Outline

- What is CAPA
- Academic Appointment/Review
- Types of Reviews
- Preparing Dossier + Self-evaluation
- Exceptional reviews + expectations
- Timeline
- Questions

# What is CAPA?

- Committee on Appointment, Promotion and Advancement
- CAPA is the peer review committee of the Librarians Association of the University of California, Berkeley (LAUC-B)
- Responsibilities:
  - Interviews of candidates for positions in the librarian series
  - Input on job descriptions for positions in the librarian series
  - Peer review for promotion and advancement in the librarian series

# CAPA Members 2023-2024

- Sam Teplitzky (2024), Chair
- Jennifer Nelson (2024)
- Ramona Collins (2025)
- Liladhar Pendse (2025)
- David Faulds (2026)
- Anna Sackmann (2026)
- Naomi Shiraishi (2026)

# New CAPA Members 2025-2027

- Sine Hwang Jensen (2027)
- Jeremy Ott (2027)

# Important people for the Librarian Review Process

- Suzanne Wones, University Librarian
- Victoria Plaut, Vice Provost for the Faculty
- Jay Lomeli, Director of Library Human Resources Department and Chief Diversity Officer
- Ricky Brown, Academic HR Analyst, LHRD
- Maria Ruiz, Academic HR Analyst, Academic Personnel Office

# Remarks from University Librarian Suzanne Wones

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# What is academic status?

- Librarians are academic appointees
- Librarians are not faculty but the librarian series is based on the faculty model:
  - Assistant Librarian, Associate Librarian and (full) Librarian.
- Career status is our equivalent of tenure

[“Librarians, LAUC-B and the AFT: The Struggle for Academic Status at the University of California, Berkeley, 1963-1991,”](#) by William L. Whitson, 1992.

# What is an academic review?

“It is the policy of the campus libraries to provide, through a fair, impartial, and appropriate system of review, that only librarians of demonstrated ability and achievement be employed, retained, and advanced, and professional growth and accomplishment be rewarded and encouraged by merit increases and/or promotion.”

“The review process is intended to ensure that professional as well as administrative considerations are taken into account in all matters of appointment, promotion, and merit increase within the Librarian series.”

- [Procedures for Review of Librarian Appointments \(Berkeley Procedures\)](#)

# What is your role in an Academic Review?

- Develop the **narrative** of your career and set your path
- Describe the **impact** of your professional contributions and document your **growth**
- Be **evaluated** by and receive **feedback** from your peers

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# Criteria for Advancement

1. Professional competence and quality of service within the library (primary job)  
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2. University and public service
3. Professional activity outside the library
4. Research and other creative activity



# Librarian Series: Types of Reviews

	<b>Standard Merit</b>	<b>Promotion</b>	<b>Career Status</b>
Description	moving within each rank by salary point in 2-3 year cycles	moving to the next rank Assistant → Associate, Associate → Full Librarian	moving from potential career status to career status (“tenure”)
Dossier	Covers <b>review</b> period	Covers <b>entire</b> career	Covers <b>entire</b> career
Ad Hoc Convened	No	Yes	Yes
Letters Required	No	Yes	Yes

**Special cases:** Greater than standard merit -- Off-cycle review (by request) -- Special review

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# Stay *focused* as you tell your story in your dossier

- **Focus** on the appropriate period under review and your own work.
- **Opportunity** to advocate for yourself, your work and your career.
- **Contextualize** any metrics (consultations, downloads, attendees).
- **Understand** your role and specify the impact of your activities.
- **Supporting** materials: be selective, use your judgment, focus on impact; avoid email correspondence
- **Examine** the “Guidelines” on LAUC-B’s review website
- **Dossier** - CAPA does not go “outside” the dossier



# Elements of the Dossier

- **Title Page** (name, current rank, type of review, review period)
- **Table of Contents** (optional)
- **Certification statement and documentation checklist** - *LHRD/APO*
- **Self-evaluation**
- **RI (Review Initiator) letter**
- **AUL or affiliated equivalent letter** - optional, added for off-cycle, GTS, promotion, or career status review, or where AUL has supplementary comments.
- **External letters of support** - required for promotion and career status reviews only
- **Supporting material** - *judiciously selected*
- **Curriculum Vitae** - current review period highlighted

# Presentation and Tips

## Dossier

- Single searchable PDF file
- Font size - 11+
- Links - as footnote or full link, [avoid embedded links](#)
- Save a backup copy of everything
- Proofread your dossier before signing

## Self-evaluation

- State your current salary point and review type in your opening paragraph
- Include pronouns if desired
- Remember to describe your primary job
- Selectively highlight accomplishments
- Pay attention to **word count**

More tips, and a template, on LHRD's website:

[http://ucblib.link/lauc-b librarian review](http://ucblib.link/lauc-b%20librarian%20review)

# Word count

Word count analysis from 2023 and 2024 review years

Review Type	Average	Median	Min	Max	CAPA Recommendation
Standard	2490	2293	1203	4714	1000-2500
GTS	3532	3131	1471	6034	1500-3000
Promotion/Career	3579	3422	1482	5995	1500-3500
Special	1431	1490	1169	1633	1000-1500
All	2855	2610			



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# Tip 1

Recommended language for the opening paragraph of a self-evaluation with clear request.

I (she/her) am an Associate Librarian at the 9th point with a current salary of \$96,073. This self-evaluation supports a standard merit increase to the 11th salary point (\$101,330) as well as a career status review.

# Tip 2

Then give a brief description of your work and role in the library.

I am the librarian for Berkeley Studies. For this review cycle, I managed the undergraduate Berkeley Studies collection, including outreach to Berkeley Studies majors and some original cataloging for specialized materials.

# Tip 3

Describe the work/project and its impact, including any metrics and context for the project.

During this review cycle, I worked on a project to survey library users. My role involved collecting data and presenting the results to several campus committees. The project's report has been viewed and downloaded >1,000 times and will inform the library's new strategic plan.

# Tip 4

Stay within the review period, but you can mention related activities.

~~I did extensive work on a book chapter which will be published in 2026.~~

During this review period, I presented the findings from my forthcoming book chapter at a workshop (2023) that was attended by 200 and led to an invitation to present at ACRL (April 2024).

# Tip 5

Briefly explain how events beyond your control impacted your work.

During this review cycle, I was unable to develop new workshops as planned due to a colleague's departure. I have covered their collecting duties in an interim capacity and have focused on maintaining outreach to their departments.



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# A note on exceptional life circumstances

Mention events that may have impacted your work

- COVID
- Reduced time (are you working 80%?)
- Leaves of absence
- Context will be taken into account
- Criteria will be applied flexibly
- Professional impacts can be described in the self-evaluation
- No personally sensitive information necessary or expected

# Exceptional Reviews - presenting a GTS case to CAPA

## Requester

## Consideration

Candidate + RI

RIs and candidate should discuss GTS well in advance so self-evaluations can be thoughtful and intentional with the desired outcome in mind  
Case is stronger if candidate and RI are in sync (added strength if AUL or equivalent also agrees)

Candidate only

If candidate asks but RI disagrees or doesn't comment, candidate needs to be proactive about making a really strong, specific case, backed up with evidence

RI only

Case is also strong if RI supports, even if candidates themselves don't ask, but RI should encourage candidate to ask as well!

*A request for a greater than standard increase is exceptional!*

# Exceptional Reviews - Multiple review types

## GTS + Career and/or Promotion

- Distinguish between the “asks”
- Career and Promotion discuss full career
- GTS refers just to the review period

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# Timeline

Date	Merit/Special	Promotion/Career
October	Call letter sent by LHRD/APO	Call letter sent by LHRD/APO
November	RI confers with librarian about review type	RI confers with librarian about review type
December	Prepare Dossier	Prepare Dossier/RI solicits letters
January		Ad Hoc committee work
February	CAPA dossier review	
March		CAPA dossier review
April		
May	UL review + decisions APO shares dossier + UL letter with VPF	UL review + decisions APO shares dossier + letters with VPF
June		Decision letters
July --> summer	Decision letters	

# Selected dates for 2024-25

November 15 - deferral requests for career/promotion

January 11 - deferral requests for merit/special reviews (UL)

January 19 - deferral requests for merit/special reviews (Affiliated)

First week of Feb - certification of promotion/career dossiers by candidate

First week of March - certification for merit/special dossiers by candidate

[Timetable for Merit and Special Reviews](#)

[Timetable for Promotion and Career Status](#)

# After the Review

- Get a copy of your dossier  
(with CAPA letter, any redacted letters, etc.)
- Consider sharing your CAPA letter with your RI
- No action
  - Eligible for review again as soon as the next cycle
  - Next review will cover period since last positive review
  - Next review not an “off-cycle” review
- Reconsideration procedures: see Berkeley Procedures



# Where to go for help

- Review Initiator
- LAUC-B mentor (Contact LAUC-B mentor program coordinator Nadia Winters if you'd like a mentor)
- Former CAPA members
- LHRD/APO
- LAUC-B Librarian Review page:  
[http://ucblib.link/lauc-b\\_librarian\\_review](http://ucblib.link/lauc-b_librarian_review)

# Guiding Documents for Reviews

- [Memorandum of Understanding](#) (UC-AFT MOU) Professional Librarian Unit (April 2019 – July 2024)
- Academic Personnel Manual ([360](#) and [210-4](#)) - Appointment and Promotion, Librarian Series
- Procedures for Review of Librarian Appointments, Promotions, and Advancement - aka [Berkeley Procedures](#)

<https://www.lib.berkeley.edu/Staff/lauc/review>

# Want to be a part of the process?

## Volunteering for an Ad hoc committee

- Must have career status
- Team of 3 who review 1-3 career status / promotion cases
- Ad hoc committee appointments are made in January
- Work completed by late March

## Volunteering for CAPA

- Must have career status
- Must hold Associate Librarian or full Librarian rank
- Service on at least one Ad hoc committee preferred
- CAPA appointments are made in the Fall
- CAPA strives to balance librarian work experience with committee needs. If you don't get onto CAPA, ask again!

Thank you for attending!

Questions?