Committee on Appointment, Promotion and Advancement

Abridged Annual Report, 2024-2025

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Appointment Files

Reviewed

For the 2024-2025 academic review period, CAPA reviewed one appointment file:

- Head of the CDL Shared Cataloging Program, in Metadata Services (MS)

Academic Review (AR) Training

We appreciate Sibyl Schaefer, Karen Heskett, Rachel Almodovar, and Estefania Campillo providing AR training in November 2024, via Zoom. This year, CAPA will reduce the number of sessions from four (two for both managers and reviewees) to two, one for each audience. Training will be recorded on Zoom and posted in LiSN.

Academic Review (AR) Files

Summary

CAPA followed academic review procedures closely this year, and our peer review process was transparent, fair, and thorough. Due to hybrid work arrangements, CAPA members met via Zoom for the entire review period.

- CAPA reviewed 17 AR files during the standard review calendar.
- Candidate rank at the time of submission:
    - Assistant = 0
    - Associate = 5
    - Librarian = 12
- Four Ad Hoc committees were appointed for review of:
    - Promotion from Assoc to Librarian = 1
    - Career Status = 2

    - Disagreement between CAPA and Review Initiator (RI)/PD = 1
- Salary Points:
    - Three of the seventeen (17%) files included recommendations by RI/PD for additional salary points: two files for two additional points, and one file for one additional point.
    - CAPA recommended one additional file for an extra salary point over the PD recommendation for standard merit.
- No Action:
    - Three files had “no action” recommendations because candidates were at the top of the salary scale (non-punitive).
    - Two files had “no action” recommendations by RI/PD to address performance issues. One of these files was incomplete.
    - CAPA recommended one additional file for a "no action" status in response to performance assessment.

Actions

There was full consensus between the PDs, CAPA, Ad Hoc committees (when applicable), and the UL on the recommended actions for the candidates this year, with one exception:

- One candidate was recommended for a standard merit review by their RI and PD, and CAPA disagreed, recommending a "no action." An Ad Hoc reviewed the case and sided with the RI/PD for standard merit. However, the UL agreed with CAPA in this case.

Recommended Points Across Reviewing Bodies

- For the three files with original recommendations for additional salary points beyond standard merit, CAPA agreed with the PDs that additional points should be awarded. However:
    - For one of the files, CAPA disagreed with the PD regarding the **number** of additional points. In this instance, the UL agreed with CAPA.
    - For one of the files, CAPA agreed with the PD regarding the award of additional points, but the UL disagreed with this assessment and approved standard merit only.
- CAPA recommended one additional file for an extra salary point over the PD recommendation for standard merit.
    - The UL agreed with the CAPA recommendation and awarded one additional point in this case.

Table 1: PD/RI Recommended Action and Points, by Rank

Rank at Time of Submission	PD Recommendation	# of Files
Assistant Librarian	N/A	0
Associate Librarian	Merit increase (including career status)	3
	Merit Increase + 1 Additional Point	1
	Merit increase + Promotion	1
Librarian	No Action (top of scale)	3
	No Action (performance review)	2
	Merit increase	5
	Merit Increase + 2 Additional Points	2
Total Files		**17**

Table 2: Summary of Recommended Actions and Points by Reviewing Body

One file is incomplete. Table 2 will be updated when possible.

Table 3: Agreement and Disagreement between groups

One file is incomplete. Table 3 will be updated when possible.

The Ad Hoc Committees, CAPA, and the UL were largely in agreement on the action approach. There was disagreement among the three regarding action for one file.

Reference Letters

During this review cycle, seven review files (41%) included requests for confidential reference letters, for 16 letters total. Every candidate with letters was either up for career status, promotion, extra points, or seeking extra support. This was an increase from last year, where 21% of the files included letters. CAPA found these letters to be extremely useful in helping us understand the impact of the candidate's work and activities, including I.A work with others on campus. A few letters were generally very positive, showing the candidate is well-respected, but did not include statements describing the candidate's specific contributions or role in a project or process. CAPA strongly recommends that candidates going up for career status, promotion, and/or extra points include reference letters, with specific prompts to guide the author towards clear observations regarding impact.

Table 4: Confidential Reference Letters Requested by Recommended Action

Recommended Action	Number of Files	Number of Files Requesting Letters	Total Number of Letters Requested	Total Number of Letters Received	Average Number of Letters per File
No Action	5	1	1	1	1
Career Status	2	2	6	6	3
Promotion	1	1	3	3	3
Merit Increase	6	0	0	0	0
Merit Increase +1 Additional Salary Point	1	1	2	2	2
Merit Increase +2 Additional Salary Points	2	2	4	4	2

2025 Academic Review Observations and Recommendations

Timeliness of the AR Process and Deadlines

Fifteen of the seventeen files (88%) were submitted to Library Employee Services (LES) by or within three business days of the February 18 deadline, compared to seven of the nineteen files (36%) submitted by the February 20 deadline last year. The two late files were passed on to CAPA on March 17 and 20th, meaning that 100% of the files were submitted and passed on to CAPA within 30 days of the deadline. Last year, seventeen files (89%) were received within 30 days of the deadline.

Furthermore, CAPA was able to begin reviewing two early submittals before the deadline. We thank our librarian colleagues and LES specialists for timely and responsive participation.

Table 5: Calendar Timeliness

Files submitted to LES	Number of Files
By February 18 (Original Deadline) - Reported received by LES on 2/24	15

1-30 Calendar Days Late (By March 21)	2
More than 30 Calendar Days Late	0

CAPA met 18 times over Zoom between early February and April 17. Occasionally, CAPA members relied on the Quince Room while Zooming with those working offsite. Quince remains essential to providing CAPA with a fully confidential conference room.

CAPA completed its work by the April 21 deadline. Like previous years, all academic review documentation was routed electronically with signatures gathered in DocuSign. CAPA found the electronic process to be efficient, with excellent support from LES.

Timeliness of the Administrative Review and UL Decisions

As noted in the Academic Review calendar, candidates were notified about the outcome of their reviews and LES forwarded the completed files to the Academic Personnel Office on June 23. CAPA received copies of the UL letters on July 1.

Ad Hoc Committees

Four Ad Hoc committees were required this year. Drawing on prior years' recommendations, in order to avoid delays, CAPA submitted names for the constitution of each committee (with alternates) well in advance. The Ad Hocs were all timely with their obligations.

Recommendation:

- Continue nominating individuals for Ad Hocs early, and include alternates.
- In the fall AR training, include a reminder about the importance of serving on Ad Hocs when called and providing the report within a two-week timeframe.

Impact of COVID-19 on Reviews - *No Longer Applicable*

File Errors

In general, there were very few errors with candidate files. When CAPA did spot an error, they were quickly corrected.

Review File Format

There is a narrow range of acceptable formats for academic review files. CAPA noted several instances where candidates deviated from the recommendations for their narrative sections, making it more difficult for CAPA to review their files. Specifically, some candidates did not highlight (or embolden) the bullet points in the first pages of their self-review that they discuss later in their narrative, so the reader finds themself flipping back and forth to match up sections.

In addition, there were cases where the self-review did not clearly differentiate between sections I.A and I.B-D. While CAPA recognizes that it can sometimes be difficult to draw hard lines between different types of work, a lack of clear delineation can make the file harder to understand. Librarians are expected to fulfill their job descriptions (I.A responsibilities) along with contributions to the University and the profession. If these are not clearly defined, it can be difficult to tell where the candidate is expending their efforts.

Another practice that popped up several times was candidates listing completed training opportunities on the Academic Biography form section 2.(f) Most Significant Contribution to Promoting Diversity. While training in this area is important, it is not a stand-alone contribution or initiative. That content can be listed with other training.

Recommendation:

- Review the importance of highlighting key bullets in the self-review.
- Outline the potential impacts of failing to effectively distinguish I.A-D in your narrative during the fall AR training, and present tips on how to decide on categories.
- Remind candidates of the Academic Biography's expandable length – and how to organize and fill it.
- Touch on impactful 2(f) entries for Most Significant Contribution to Promoting Diversity.

Academic Review Procedures Manual (ARPM)

Updates

Following discussion on form Appendix IX at the CAPA/SLT meeting in late summer 2024, Laurel McPhee, Amanda Roth, and Cristela Garcia-Spitz re-worked the form to a more logical and streamlined format. LES approved the form in October 2024, and we used it this year for all reviews. It worked well and was a big improvement.

Recommendations

The 2024-2025 CAPA does not have any new recommendations for edits to the ARPM.

However, there is still a small unfinished task from prior years. In November 2024, Estefania Campillo and Rachel Almodovar emailed Laurel McPhee a revised copy of the ARPM with suggested new language, provided by them and/or SLT and prior years' CAPA, in red. These changes were belated, as they were in response to some suggestions brought forward by the 2023 CAPA report. Following the guidance in Appendix XII, Laurel shared the new language at the next LAUC member meeting. The new language was supported at the LAUC meeting, and there were no follow-up questions. According to Appendix XII, "following input from LAUC-SD and per UC San Diego delegated authority from the Chancellor the University Librarian has the authority to finalize the ARPM," however the 2021 ARPM is still on the Library website. The approved new language is ready to publish.