Annual Evaluation Standards and Procedures (AESP)
Medical Librarians
Department of Medical Education
College of Medicine
December 2024

Medical Librarians at the UCF College of Medicine Health Sciences Library (HSL) have faculty appointments in the Department of Medical Education.  The HSL Director and HSL department heads conduct annual faculty evaluations, overseen by the chair, using both qualitative and quantitative data and information.

Faculty medical librarians have a wide range of responsibilities supporting the College of Medicine's teaching, research, and service missions. Performance standards are flexible yet detailed enough to clarify expectations and allow evaluators to consider individual contexts.

Annual performance evaluations are based on the Faculty Annual Report (FAR),    student evaluations, learner outcomes data, annual assignment forms, and other sources. These sources may include input from a supervisor (if different from the HSL director or chair), peers, students, employees, other university officials, and individuals to whom the employee is responsible during service assignments. All assigned activities shall be reported upon and evaluated.

Medical librarian performance evaluations are based on criteria divided into three areas:  1) Performance of Professional Responsibilities – Librarianship; 2. Scholarship; and 3. Service to the Library, the Institution (Department, College, and University), the Community, and the Profession.

PERFORMANCE STANDARDS

Each librarian shall meet with their supervisor prior to or at the beginning of the evaluation period to
discuss the librarian's professional responsibilities and expectations for the period. The standards
for professional responsibilities are, therefore, based on the specific responsibilities outlined in each
librarian's unique Faculty Annual Assignment ("Appendix C"), area of library specialization, assigned FTE, rank, time devoted to activities, and other relevant factors.

The College and department recognize that there are multiple indicators of various levels of performance and that performance indicators will vary over time and across career stages. This document does not provide a specific formula for evaluating medical librarian faculty performance. However, it describes accomplishments most likely to lead to favorable evaluations. The sections below provide representative indicators of **excellence** and **effectiveness** for each performance area. Sufficient evidence of effectiveness is the minimum requirement for **Satisfactory**.

## **AREAS OF FACULTY PERFORMANCE**

 1) Performance of Professional Responsibilities – Librarianship; 2. Scholarship; and 3. Service to the Library, the Institution (Department, College, and University), the Community, and the Profession.

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## 1) PERFORMANCE OF PROFESSIONAL RESPONSIBILITIES – LIBRARIANSHIP

Medical librarians are health information professionals with specialized knowledge in accessing and sharing quality health information resources with learners, trainees, researchers, clinicians and other consumers. Health sciences librarians use innovative strategies and tools to access and deliver critical information for patient care, research, and publication.

Areas of responsibility for librarians may include but are not limited to:

- Assessment
- Acquisitions
- Cataloging and metadata
- Collection development
- Department head
- Digital initiatives
- Electronic resources
- Instruction
- Interlibrary loan
- Outreach
- Reference
- Research
- Scholarly communication
- Special collections
- Web and technology

| **Overall professional responsibilities - librarianship ratings** to be used for the annual evaluation are: |
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| **Unsatisfactory** – the absence of significant evidence of **effectiveness** in librarianship. |
| **Conditional** – minimal evidence of **effectiveness** in librarianship. Individuals receiving this rating may have areas needing improvement. |
| **Satisfactory** – appropriate evidence of **effectiveness** in librarianship. Effectiveness can be supported by peer review, student evaluations, and other accomplishments. |
| **Above Satisfactory** – strong evidence of **effectiveness** in librarianship. They may demonstrate excellence in some areas but not achieve key metrics. |
| **Outstanding** – strong evidence of both **effectiveness** and **excellence** in librarianship. Medical librarian faculty in this category will be outstanding. |

| **Librarianship Performance Indicators Examples** | |
| --- | --- |
| Indicators of **_Excellence in Librarianship_** include: | Indicators of **_Effectiveness_** include: |
| <ul><li>Demonstrates mastery of one or more fields of library specialization</li><li>Specializes in one or more areas of medical librarianship.</li><li>Completes/maintains certification(s) of specialization.</li><li>Outstanding skill in formulating and executing complex search strategies in a variety of information resources; customizes search outputs.</li></ul> | <ul><li>Demonstrates competence in at least one field of library specialization.</li><li>Engages in professional development enhancement activities to achieve specialization/expertise/</li><li>Locates published information and assesses its authority, accuracy, objectivity, currency, and relevance.</li><li>Capably conducts searches; identifies relevant resources; formulates search strategies using appropriate search construction techniques, subject</li></ul> |

- Participates in didactic courses; one-on-one and small group interactions with faculty and/or students; and planning or teaching faculty development or continuous professional development training programs.
- Evidence of ability to use evaluation methodologies, including bibliometrics, to develop and implement collection management policies and strategies.
- Applies knowledge to open-access publishing and virtual learning environments; contributes to copyright and intellectual property law discussions on behalf of institutions or associations; monitors trends in open-access publishing; promotes institutional repositories.
- Formulates institutional strategies for archiving, digital preservation, and records management; promotes the significance of institutional asset management.
- Conducts data curation interviews; develops and implements data management plans and policies; consults on managing data across the data life cycle.
- Successfully negotiates terms and conditions of licensing contracts.
- Evaluates, develops, and implements innovative instructional and communication strategies and technologies.
- Creates and implements HSL strategic plans.
- Articulates a vision, motivates and leads others to contribute to the realization of the HSL vision, and guides institutional change.
- Establishes, justifies, and leads large-scale collaborative projects that demonstrate return on investment to stakeholders; provides and models value-based leadership through staff and resource administration.
- Controls and supervises library resources consistent with institutional objectives and

- descriptors, and natural language and Boolean connectors.
- Demonstrates proficiency in the use of collection management tools.
- Organizes resources according to national and international standards.
- Adheres to standards in archiving, digital preservation, and records management.
- Skilled use of access, including open access, management systems, and services.
- Ably applies open access and publishing models, institutional repositories, authors' rights, and public access policies.
- Capably addresses data life cycle; identifies and describes data resources, tools, and repositories; explains data plan requirements of funding agencies.
- Demonstrates knowledge of trends in communication and instructional methods and technologies; uses social media and web-based technologies.
- Participates in the strategic planning process.
- Uses effective communication and collaboration skills.
- Supports institutional mission and goals; forms internal partnerships.
- Participates in marketing and public relations strategies and programs.
- Competently applies evidence-based practice; formulates questions; develops search strategies; locates relevant, credible, and transferable published evidence.
- Gathers data and user input on activities and services.
- Identifies current trends and their impact on information services and practices.
- Describes the healthcare environment and current trends in healthcare.
- Promotes access to health information; participates in community outreach activities.
- Participates in professional organizations by serving on committees, publishing, or

sound business principles (e.g., library budget); advocates for and secures institutional support to ensure maintenance and growth of the library.

- Applies grant-writing principles and strategies; identifies partners and collaborates to develop proposals; executes fundraising strategies; disseminates information about successful strategies and outcomes.
- Uses formal and informal user experience assessment results to propose and implement library user experience enhancements.
- Leads initiatives to incorporate new technologies.
- Identifies and develops evaluation methods and metrics for assessing and improving services.
- Exhibits autonomy in supporting the library's Personal Librarian program, including providing one-on-one instruction to medical students.
- Selects and implements appropriate research design; collects, manages, and analyzes data; interprets results; explains threats to the validity of conclusions.
- Explains the rationale for the choice of statistical and data analyses; critiques and explains statistical and data analyses in published research; uses advanced data visualization tools.
- Communicates research results; writes, edits, and revises manuscripts for publication.
- Collaborates with fellow health information professionals to achieve common goals; advocates the value of health information professionals in improving health care and institutional return on investment.
- Employs expertise to influence programs, services, and policies; collaborates nationally or internationally.
- Assists institutions in meeting accreditation and legal requirements; responds to trends by redirecting resources.

presenting; obtains Academy of Health Information (AHIP) membership.
- Identifies gaps in knowledge and skills; seeks professional development opportunities and mentors to address gaps.

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| • Employs expertise to influence health information programs, services, policies, and legislation.<br>• Serves in a leadership role in a professional organization or publication; serves as a representative to a national or international organization.<br>• Mentors other librarians. | |

Source:  Medical Library Association (MLA) list of Competencies
https://www.mlanet.org/professional-development/mla-competencies/

## 2. RESEARCH/SCHOLARSHIP

Research/Scholarship includes contributions to discovering new knowledge in librarianship or related fields and other forms of creative activity in higher education.

There are five indicators of performance (detailed below), and sufficient evidence of **effectiveness** is the minimum requirement for satisfactory performance.

| **Research/Scholarship performance ratings** to be used for the annual evaluation are: |
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| **Unsatisfactory** – the absence of evidence of **effectiveness** in research/scholarship. |
| **Conditional** – minimal evidence of **effectiveness** in research/scholarship. Individuals receiving this rating will have limited evidence of research/scholarly impact. |
| **Satisfactory** – appropriate evidence of **effectiveness** in research/scholarship. |
| **Above Satisfactory** –  evidence of both **effectiveness** and **excellence** in research/scholarship. |
| **Outstanding** – strong evidence of both **effectiveness** and **excellence** in research/scholarly activity. |

| **Research/Scholarship Performance Indicators Examples** | |
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| Indicators of ***Excellence*** include:<br>• Peer-reviewed primary and/or corresponding senior-authored publications that demonstrate evidence of originality as an investigator.<br>• Publications of original research in leading discipline-related journals. | Indicators of ***Effectiveness*** include:<br>• Publication of articles in professional journals appropriate to the field of endeavor.<br>• Publication of books, monographs, or manuals that are widely disseminated, |

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| • Recognition from peers in the field, e.g., fellowships, research awards, publication awards, and invitations to present keynote or plenary addresses at national or international meetings.<br>• Key participation in forming productive collaborative research arrangements with industry, community agencies, foundations, and other academic institutions.<br>• Award of patents and/or royalty/licensing agreements.<br>• Coordination of interdisciplinary or interprofessional investigations and projects.<br>• Leadership of national meetings or workshops.<br>• Authorship of a textbook, textbook chapter, review articles, and contributions of published symposia.<br>• Editorship or associate editorship of scholarly, refereed journals or of special issues of a journal.<br>• Evidence of leadership of or contributions to successful team efforts at the interface with other academic disciplines. | evaluated by peers, and advance the field of endeavor.<br>• Participation in interdisciplinary or interprofessional investigations and projects.<br>• Invited presentations at regional/state/national meetings or at institutions or academic organizations.<br>• Service on editorial boards of journals.<br>• Presentation of papers or posters at regional/state/national conferences and professional meetings of appropriate disciplines.<br>• Publication of chapter(s) in scholarly book(s).<br>• Ad hoc reviewer for journals and/or national or international organizations.<br>• Refereed publications in proceedings of conferences and professional meetings.<br>• Well-documented contribution (i.e., mentorship) to others' research.<br>• Significant self-development activities, such as faculty development, that lead to increased research and publication effectiveness.<br>• Contribution in area of expertise to the scholarship of others.<br>• Serving as a research mentor for medical students or residents. |

## 3. SERVICE TO THE LIBRARY, THE INSTITUTION (DEPARTMENT, COLLEGE, AND UNIVERSITY), THE COMMUNITY, AND THE PROFESSION

All faculty members are expected to participate in professional service activities as a part of their institutional citizenship. This includes service to the department, service to the University, service to the profession, and service to the community. Examples include serving on committees within the university, college, and department and contributing to faculty governance, strategic planning, accreditation, student recruitment, and faculty search committees. Service to professional organizations and the community, such as holding offices in societies or serving on boards, is also important. Community service should involve the application of professional expertise.

Service will be evaluated based on the quantity (compared to the FTE assigned) and the quality of the service (i.e., alignment with institutional goals and priorities).

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The Department of Medical Education faculty should prioritize the critical service needs of COM and the MD program (e.g., Admissions Committee, Student Evaluation and Promotions Committee, Curricular Committees, and accreditation activities) and essential departmental and College functions.

| **Professional Service performance ratings** to be used for the annual evaluation: |
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| **Unsatisfactory** – the absence of significant evidence of effectiveness in professional service. |
| **Conditional** – minimal evidence of **effectiveness** in service. Individuals receiving this rating typically have limited involvement within the department and an absence of extra-departmental service. |
| **Satisfactory** – appropriate evidence of **effectiveness** in service. Those in this category will be involved in local service appropriate for their career stage and time assignment and often will have evidence of national service. |
| **Above Satisfactory** – strong evidence of both **effectiveness** in service. Faculty in this category will be engaged in local service activities and in membership at regional or national professional organizations. |
| **Outstanding** – strong evidence of both **effectiveness** and **excellence** in service. Faculty in this category will successfully engage in impactful local service activities such as chairing committees. Prominent national-level service in professional organizations would be typical. |

| **Professional Service Indicators** | |
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| Indicators of ***Excellence in Service*** include:<br>• Service activities that enhance the reputation of the COM and University.<br>• Administrative leadership role within College or University.<br>• Officer in the Faculty Senate.<br>• Chair of a major University committee or task force.<br>• Demonstration of a significant time commitment to or role in committee work.<br>• Other demonstrated leadership in departmental, College, University, or system administrative or service roles.<br>• Officer, committee chair, or board/committee member in a state/regional/national/international professional organization in one's discipline or state/regional/national/international task force.<br>• Program chair or similar position for a national/ international meeting. | Indicators of ***Effectiveness in Service*** include:<br>• Service activities contribute to the desired goals of the University.<br>• Service on University, College, department committees and task forces.<br>• Serving in administrative roles within the department.<br>• Service to the department by active participation in department meetings and attending graduation and department functions.<br>• Participation in Departmental, College, or University strategic planning, P&T committees, institutional awards committees (e.g., RIA, TIPS, SOTL), and faculty development programs.<br>• Active participant/contributor to regional/state/national professional organizations. |

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| • Service on study sections (or scientific peer review groups), consensus panels, etc.<br>• Service on a major governmental commission, task force, committee, or board.<br>• Evidence of excellence in professional service to the local community and public.<br>• Serving as editor or member of the editorial board of a major journal.<br>• Organization of regional, national, and international symposia and colloquia.<br>• Significant and effective mentorship of junior faculty members as evidenced by selection for College, University, or professional association outstanding mentoring awards.<br>• Serving on national professional society program committees.<br>• Election to major national professional societies | • Officer in regional or state professional organization.<br>• Program chair or similar position for regional or state professional organization meetings.<br>• Active member of the Faculty Senate.<br>• Advisor to student organizations.<br>• Evidence of professional service to the local community and public at large.<br>• Significant self-development activities that lead to enhanced service effectiveness.<br>• Service as a reviewer for major refereed journals or as an ad hoc reviewer.<br>• Presentation of continuing education programs. |

<u>Other Assigned Duties and Administration Roles</u>:

Most faculty will not be evaluated in this category. The evaluation of other assigned duties and/or administrative roles in a medical school will be based on the specific role, responsibilities and goals and the direct supervisor's assessment. The HSL Director or Chair and the faculty member will meet at the beginning of the evaluation period and agree in writing on the criteria that will be used for this evaluation.

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## Overall Rating on Annual Performance Evaluation

The <u>overall</u> annual evaluation of each faculty member will be based on the average of their performance in assigned categories weighted by the FTE assigned for each category. To receive a rating of satisfactory or above, the faculty member must have a rating of satisfactory or above in each category evaluated, regardless of the score obtained by the weighted average. A rating of conditional in any category will result in a conditional rating overall. A rating of unsatisfactory in any category will result in an unsatisfactory rating overall.

**Standards and Ratings for Faculty**
The Chair of the Department will evaluate each faculty member's performance annually, assigning one of the following ratings:

• **Outstanding:** Exemplary performance and strong evidence of **excellence** and **effectiveness** in all assigned areas. This rating indicates adherence to the highest standards of the COM, the university and the profession. To receive an evaluation of "outstanding," the faculty member must have no rating below "satisfactory" in any category.

• **Above Satisfactory:** Indicates performance that exceeds expectation for the assignment, with appropriate evidence of **effectiveness** in all areas and **excellence** in the primary assigned area.

• **Satisfactory**: Reflects performance that is at expectation for the assignment and demonstrates effectiveness in assigned areas. To receive a rating of "Satisfactory," faculty must not have received a " Conditional " rating in their primary assignment area.

• **Conditional:** Indicates minimal evidence of effectiveness in assigned areas and/or substandard performance for the assignment. Individuals receiving this rating will have one or more areas needing substantial improvement.

• **Unsatisfactory:** Indicates the absence of evidence of effectiveness in assigned area(s), extreme substandard performance, or egregious behavior. This rating reflects falling below the professional standards, disregarding professional responsibilities, or violating UCF or COM policies or regulations.

Note: The annual percentage of effort assignment for each category will be multiplied according to the following scale:

| Evaluation | Category Points |
|---|---|
| Outstanding | 4.0 |
| Above Satisfactory | 3.0 |
| Satisfactory | 2.0 |
| Conditional | 1.0 |
| Unsatisfactory | 0 |

Approved HSL Medical Librarians 12.12.24