

**Report on the Outcomes of the Discussions of the Ad Hoc Working Group
on Librarians' Issues**

March 9, 2004

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Introduction

The Ad Hoc Working Group on Librarians' Issues (hereafter "the Group") has met ten times. The context within which discussions have taken place is important. Notes from an Oct. 28, 2003 meeting provide good background (Appendix 1 below). Some of the salient points are:

- At the end of the FAUW-UW Administration negotiations, two "tracks" to address the issues of concern to librarians presented themselves: 1) the "Staff Relations Committee Track" (SRC Track) for matters relating to UW policy and 2) the "Administrative Track" for issues that can be dealt with administratively by the University Librarian
- Staff policies and procedures continue to apply to librarians
- This is the framework within which we will be discussing the issues
- We need a clear understanding of what the specific issues are in order to see if there are means within our current framework to address the concerns

The document, "Librarians' Terms and Conditions of Employment: Needs and Issues" was presented by the LAUW Executive to the Group as a list of issues for discussion.

At its first meeting, the Group regrouped the issues by common theme (Appendix 2) and agreed that as each issue or group of issues was discussed, the initial focus should be on ensuring there is a common understanding of the issues involved. Appendix 3 is a consolidated list of the issues.

The following is an outline of the outcomes of the Group's deliberations.

Administrative Track - Group 0

1. **Issue:** Insecurities about the legal status of the Librarians' Handbook. Some sections do not apply to all librarians and many sections are based on UW staff policies. Document is essentially a handshake agreement.
9. **Issue:** No professional advancement for administrative librarians resulting in little recognition for professional activities. Deters non-administrative librarians from assuming administrative positions.

Outcome of discussions

In discussing "Insecurities about the legal status of the Librarians' Handbook" (Issue # 1) it became clear that a key concern was the desire to ensure that the Librarians' Employment Handbook (LEH) could not be changed or amended arbitrarily and without consultation. We agreed to address this in the following way: Any library staff member to whom the document applies may direct a request for a substantive amendment to the University Librarian. The University Librarian convenes a Librarians Employment Handbook Review Committee to consider any proposed substantive amendments to the LEH. We also agreed to make explicit the role of the Associate Provost, Human Resources & Student Services, and the Associate Provost, Academic & Student Affairs, in reviewing and approving the document.

The LEH Review Committee will consist of the University Librarian, the coordinator for human resources management in the Library, four librarians (chosen by the librarians) representing various areas of the Library, and consultants as appropriate.

There was significant discussion about the concern that there is "No professional advancement for administrative librarians" (Issue # 9). Following that meeting, this matter was reviewed with Alfrieda Swanston and Catharine Scott. Administrative librarians are now eligible for promotion through professional advancement. As is the case with non-administrative librarians, the promotion of an administrative librarian through professional advancement will be reflected in a move from one salary grade level to the next (up to USG 13) for that person. In the case of administrative librarians, such promotion does not change the salary classification of the position that the librarian holds.

Revised wording for the LEH has been prepared and will be sent with other proposed changes to the Associate Provost, Human Resources & Student Services, and the Associate Provost, Academic & Student Affairs, for review and final approval. (see Appendices 4 and 5 below)

Administrative Track - Group 1

6. **Issue:** Active support for and encouragement of professional development and contributions to librarianship practice and theory.
8. **Issue:** Workload assignments do not take into account time during the academic year for professional development and research or scholarly activities.
10. **Issue:** No financial support for professional and research expenses such as library association memberships; journal subscriptions, books and similar professional publications; purchase of supplies, computer, software, services etc. This benefit is available to our comparator librarians.

Outcome of discussions

An overarching aspect of the discussions of the issues in Group 1 was the theme of support for professional development. It was acknowledged that the Library has a strong tradition of actively supporting professional development. Librarians are expected to engage in activities that enhance their professional development, and participation in such activities is recognized and rewarded. A variety of initiatives were discussed and agreed upon, all of which are meant to underscore the Library's "active support for and encouragement for professional development."

- A) It was agreed that revisions to the wording in the sections on "leaves" in the LEH would help facilitate, encourage and expedite use of the various leave opportunities open to librarians. Proposed revisions to section 5.13 and Appendix C of the LEH are found below in Appendices 6 and 7.

Some of the key points are:

- A Library Study Leave Review Committee will be established
- The process to apply for conference leave will be streamlined. Applications for conference leave will be considered by one's Department Head/Manager in consultation with his/her Manager. When funds requested by an individual exceed \$1500¹ in a fiscal year the application will be subject to the approval of the Library Executive Committee.
- Guidelines for applying for conference travel funding will be drafted for review.
- A report will be prepared annually indicating:
 - The number of applications for professional development travel funds approved and the number not approved
 - The total amount spent on travel for professional development
 - The events attended.
- "Observation leave" will now explicitly provide for consultation of scholarly information resources as well as systems and services.
- Funds permitting, a Library internship programme will be introduced to help address the workload issue

¹ Subject to review annually

B) On the matter of financial support for professional and research expenses, the key points were:

- After a survey of librarians, it was agreed that financial support for journal subscriptions is no longer an issue because required articles are usually readily available. Exceptions will be handled on a case-by-case basis.
- The Library recognizes that library staff carrying out research may require access to research materials not held locally. In some cases, it may be possible to satisfy these needs by, for example, suggesting that a selector purchase the items on a particular fund, by borrowing the items through Interlibrary Loan, or by visiting libraries that hold copies of the items. In other cases, for example, when extensive ongoing consultation of the material is required, this may not be practicable, and a copy of the item will need to be purchased.

If the purchase cost is less than \$150.00 Cdn., a request to order the item may be sent to the Library Acquisitions Manager. For items with a purchase cost of more than \$150.00 Cdn. the request should be submitted to the Associate University Librarian, Information Resources & Services, for approval. Items purchased in this way will be library property. At the end of each fiscal year, this arrangement will be reviewed to assess its efficacy. Continuation of this arrangement is subject to budgetary constraints.

A list of materials purchased for professional development/research will be made available annually.

- Institutional memberships to OLA, CLA and ALA will be arranged.

Administrative Track - Group 2

- 7. **Issue:** No consultation and input to layoffs, redundancy etc. plans and decisions.
- 11. **Issues:** Absence of librarian input and participation in UW Governance especially with respect to academic policy and procedure issues.
- 12. **Issue:** No expectation that librarians will be actively involved in decision making and strategic planning for UW Library. (Management/clerical organizational style).

Outcome of discussions

Section 7 of Policy 18 deals with the “Impact of Organizational Change on Staff Positions”, and notes that:

Staff members’ knowledge of their work units and their ideas for achieving efficiency or cost reduction are important considerations in planning change. Therefore, organizational change normally should be preceded by open internal consultation with affected staff members.

The Library is committed to acting in accordance with this policy.

The Group agreed that particularly when the Library is considering broader organizational matters one appropriate approach would be to establish groups with broad representation to consider issues and make recommendations.

In its discussions on the issue of “input and participation in UW Governance especially with respect to academic policy and procedure”, the Group did some initial fact-finding. The following table was of particular interest in this context.

Faculty Council	Librarian who attends	Official Membership	Voting Rights
Arts	Jane F.	Y	Yes
Math	Dan	Y	No
AHS	Yulerette	Y	No
Engineering	Jim/Doug	N	No
Science	Anne/Jackie	Y	Yes
Environmental Studies	Margaret	Y	Yes

It was agreed that the University Librarian will seek opportunities to make Faculties aware of the Library’s interest in actively participating in Faculty Council meetings. One such opportunity has already been pursued in the case of Engineering and the outcome was positive.

The Library has voting privileges in Senate, Senate Undergraduate Council and Senate Graduate & Research Council through the membership of the University Librarian.

It was agreed that all librarians have an important role to play in ensuring the Library’s visible and active participation in the academic community. There is no one way to accomplish this. Ongoing and engaged initiatives at various levels and in varying forums are called for.

Administrative Track - Group 3

4. **Issue:** Librarians' salaries have been falling behind the average in Ontario for several years. (CARL, OCUL and CAUT data and job ads)

Outcome of discussions

After reviewing recent CARL and ARL salary survey data, the LAUW representatives on the Group agreed that salaries are now in a satisfactory position and the above statement is no longer the case. The Group agreed that continuing to monitor salary data is important. It was also noted that the "Hill Report" indicates that "The current starting salary for a librarian at Waterloo is higher than most, which bodes well for future recruitment."

The January 21, 2004 Daily Bulletin provided information on a survey being prepared on staff compensation issues. The Bulletin article ends with the following paragraph:

The Staff Relations and Compensation Committees understand that it is important to staff to know where UW stands in relation to other universities on issues such as benefits and salaries. . . . The Staff Association receives numerous requests for comparative data regarding salary, and Policy 5 states that this comparison should be conducted periodically. As such, the Staff Compensation Committee has decided that it is time to conduct a market survey to determine whether UW's salaries remain in line with the market from which it recruits.

In support of this, the Library Executive Committee will ensure that the Staff Compensation Committee receives the CARL and ARL salary survey data annually.

Staff Relations Committee Track

2. **Issue:** Shortcomings of the staff grievance process especially with respect to academic freedom protection, secrecy of outcomes; Provost decides redundancy and also rules on the outcome of any grievance on redundancy; list of issues which can't be grieved etc.
3. **Issue:** Protection of Librarians' academic freedom is not available at UW. Librarians' professional judgement is respected and protected at other academic libraries. Intellectual freedom refers to the protection of expressions of knowledge. This is protected by the Charter and also upheld by librarians. (CLA statement).
5. **Issue:** Inadequate initial vacation entitlement (3 weeks with 4 weeks reached after 8 years employment). This is below the industry standard of 1-month minimum as seen in job ads and other librarian employment agreements.

Updates

Issue #2 - Shortcomings of the staff grievance process

While it was acknowledged that this is a matter for the Staff Relations Committee track, the LAUW representatives of the Group noted that there are aspects of the Faculty policy which are preferable to them.

Issue #5 – Vacation entitlement

This particular item had been left on the list of issues so that the Group could explore the issues involved. After some discussion, the Group agreed that job satisfaction appeared to be the issue.

Issue # 3: Protection of Librarians' academic freedom

It is our understanding that the discussions on this matter have been positive and constructive.

Appendix 1

Meeting Notes

Mark Haslett, University Librarian and Librarians
Oct. 28, 2003, Davis Conference Room, 10:30 a.m.

Present: Lorraine Beattie, Susan Bellingham, Laura Briggs, Jane Britton, Amy Chan, Jane Forgay, Christine Jewell, Sandra Keys, Bill Oldfield, Jim Parrott, Richard Pinnell, Shabiran Rahman, Susan Routliffe, Dan Sich, Linda Teather, Marina Wan

Mark opened with a statement of his intentions for this meeting:

- to give an update on his understanding of “where things were left” at the end of the FAUW/LAUW-UW Administration negotiations last year
- to give an update on his meeting with LAUW Executive Oct. 23, 2003
- to explain his “take” on how to proceed over the next few months

Mark explained that he had been “debriefed” by Bruce Mitchell, both new in their respective positions. He said that it was clarified for him that in looking at the issues that were left at the end of the negotiations, there are two “tracks” to follow in trying to find resolution. There are 1.) issues that have to be dealt with through the Staff Relations Committee and. 2.) issues that can be dealt with by Mark in his position as University Librarian. He referred to these as the “SRC Track” and the “Administrative” or “UW Librarian Track.”

At the end of the FAUW/LAUW-UW Administration negotiations, article 12.2A (regarding the status of Librarians) remains in the FAUW Memorandum of Agreement. However, as it stands right now, librarians continue to be staff and staff policies and procedures continue to apply to them. This is the framework within which we have to proceed to look at the issues.

Mark stated that there are three issues he is not able to address: academic freedom, grievance procedures and vacation entitlement. In the case of the first, a sub-committee of the Staff Relations Committee has been set up to look at the issue of academic freedom in the context of all staff at UW. Linda Teather has agreed to represent librarians’ interests at this committee. The latter two, grievance procedures and vacation entitlement, are staff policies and must be dealt with through SRC in one of two ways: a group or individual can go directly to the Chair of the SRC, or can go to the Staff Association.

Other issues, such as professional development, for example, have been referred to Mark as University Librarian to deal with as internal administrative issues. Mark stated that with the negotiations concluded, this is the framework within which we have to proceed, “in good faith.”

Mark met Oct. 23, 2003 with the LAUW Executive who agreed with his proposal to look at issues by forming an ad-hoc working group composed of himself, Lorraine Beattie, Susan Routliffe and three or four librarians to be appointed by themselves (over the next two weeks). He wishes to proceed as expeditiously as possible. He stated that we need a clear understanding of what the specific issues are and to see if there are means

within our current framework to address these issues. He is asking us as librarians to give him an outline of issues of concern (which is not exclusive – other issues may come up at the table). He would like, within the next two weeks, a list of the librarians we would like to be part of the ad-hoc group, and a list of the issues.

Shabiran introduced a quickly drafted list of issues and stated that she would send it to all librarians and that Jane Britton would receive and compile additional issues sent to her by e-mail. Also that any volunteers for the ad-hoc working group should send Jane Britton e-mail to that effect.

Shabiran and Linda clarified the reason for moving ahead quickly with this working group. Although article 12.2A remains in the MOA, at the end of the negotiations FAUW and LAUW decided on a six-month period (extended to Feb. 2004) to seek resolution of issues through other avenues. They will meet in Feb. 2004 to assess progress and whether or not to seek to re-open negotiations.

Mark re-iterated the need to move forward in good faith.

At this point there was some discussion of the history of the vacation entitlement currently available to new employees and the fact that it is a recruitment/retention issue.

Linda stated that it is important to understand that at the end of the negotiations, LAUW/FAUW felt most strongly that FAUW was still the most appropriate body to represent librarians, but because the negotiations were at an impasse, in good faith LAUW decided to take six months to seek other avenues to address their concerns. Mark re-iterated his desire to find ways to address concerns openly, through the ad-hoc group or directly by approaching him.

Mark, Lorraine and Susan Routliffe then left the meeting.

The remainder of the meeting was spent in discussing issues and deciding how to proceed:

It was agreed that the list of 12 issues (as amended by Linda Teather) which were prepared for the FAUW negotiations will be sent to all librarians as a basis for thinking about issues. These are the issues that will be looked at in February with FAUW, but that does not mean we have to limit the ad-hoc group to these issues only. Please send issues/concerns to Jane Britton, who will compile them.***

It was agreed that we would prefer four librarians for the ad-hoc working group. Librarians who wish to volunteer should send their names to Jane Britton.***

***NB This should be done as soon as possible – within a week, given Mark's commitments.

Appendix 2

Librarians' Terms and Conditions of Employment: Needs and Issues (presented by the FAUW/Librarians Negotiating Team, April 2003)

Regrouped – November 19, 2003 meeting

Group 0

1. **Issue:** Insecurities about the legal status of the Librarians' Handbook. Some sections do not apply to all librarians and many sections are based on UW staff policies. Document is essentially a handshake agreement.

Solution: Include Librarian terms and conditions of employment in M of A or create a similar legally binding librarians' employment document.

9. **Issue:** No professional advancement for administrative librarians resulting in little recognition for professional activities. Deters non-administrative librarians from assuming administrative positions.

Solution: Develop a professional advancement procedure for administrative librarians that is consistent with the procedures for non-academic librarians.

Group 1

5. **Issue:** Inadequate initial vacation entitlement (3 weeks with 4 weeks reached after 8 years employment). This is below the industry standard of 1-month minimum as seen in job ads and other librarian employment agreements.

Solution: Return to a 1-month entitlement and allow it to be taken in the year it is earned as for faculty. Recruiting issue.

6. **Issue:** Active support for and encouragement of professional development and contributions to librarianship practice and theory.

Solution: Formalized procedures for sabbaticals (e.g. 6 months every 3 years) as well as short study leaves (1- 2 months) or professional development entitlement days.

8. **Issue:** Workload assignments do not take into account time during the academic year for professional development and research or scholarly activities.

Solution: Entitle librarians to release time e.g. x days per year for professional development, research and scholarship. Develop procedures.

10. **Issue:** No financial support for professional and research expenses such as library association memberships; journal subscriptions, books and similar professional publications; purchase of supplies, computer, software, services etc. This benefit is available to our comparator librarians.

Solution: Provide an allowance to each librarian equal to that of faculty. Annual increases should match those of faculty. Procedures for reimbursement etc. follow faculty procedures.

Group 2

2. **Issue:** Shortcomings of the staff grievance process especially with respect to academic freedom protection, secrecy of outcomes; Provost decides redundancy and also rules on the outcome of any grievance on redundancy; list of issues which can't be grieved etc.

Solution: For librarians, follow the faculty grievance model outlined in M of A.

7. **Issue:** No consultation and input to layoffs, redundancy etc. plans and decisions.

Solution: Collegial organization of the library. Follow Faculty procedures since librarians' work directly tied to both faculty research and curriculum.

11. **Issues:** Absence of librarian input and participation in UW Governance especially with respect to academic policy and procedure issues.

Solution: Librarians become full voting members of Faculty Councils and are eligible for Senate appointments and committee work. Board of Governors designates Library as an academic unit.

12. **Issue:** No expectation that librarians will be actively involved in decision making and strategic planning for UW Library. (Management/clerical organizational style).

Solution: Adopt a collegial management style with a Librarians' Council with rights and responsibilities comparable to a Faculty Council.

Group 3

4. **Issue:** Librarians' salaries have been falling behind the average in Ontario for several years. (CARL, OCUL and CAUT data and job ads)

Solution: Revise Librarians' salary structure, the method for applying annual scale and merit increases; Develop a Non-Hay salary structure & process comparable to faculty model (initial level, thresholds for each rank); Resume making annual comparisons with comparator libraries and use this information to maintain and enhance UW Librarian's salaries at all levels. Recruiting and retention issue.

Other track

3. **Issue:** Protection of Librarians' academic freedom is not available at UW. Librarians' professional judgement is respected and protected at other academic libraries. Intellectual freedom refers to the protection of expressions of knowledge. This is protected by the Charter and also upheld by librarians. (CLA statement).

Solution: Add librarians to article 6 in M of A or write a separate academic freedom article for Librarians. [Issue referred to Staff Relations Committee subcommittee]

Appendix 3
Issues grouped by “track” and theme
March 1, 2004

Administrative Track - Group 0

1. **Issue:** Insecurities about the legal status of the Librarians' Handbook. Some sections do not apply to all librarians and many sections are based on UW staff policies. Document is essentially a handshake agreement.
9. **Issue:** No professional advancement for administrative librarians resulting in little recognition for professional activities. Deters non-administrative librarians from assuming administrative positions.

Administrative Track - Group 1

6. **Issue:** Active support for and encouragement of professional development and contributions to librarianship practice and theory.
8. **Issue:** Workload assignments do not take into account time during the academic year for professional development and research or scholarly activities.
10. **Issue:** No financial support for professional and research expenses such as library association memberships; journal subscriptions, books and similar professional publications; purchase of supplies, computer, software, services etc. This benefit is available to our comparator librarians.

Administrative Track - Group 2

7. **Issue:** No consultation and input to layoffs, redundancy etc. plans and decisions.
11. **Issues:** Absence of librarian input and participation in UW Governance especially with respect to academic policy and procedure issues.
12. **Issue:** No expectation that librarians will be actively involved in decision making and strategic planning for UW Library. (Management/clerical organizational style).

Administrative Track - Group 3

4. **Issue:** Librarians' salaries have been falling behind the average in Ontario for several years. (CARL, OCUL and CAUT data and job ads)

Staff Relations Committee Track

2. **Issue:** Shortcomings of the staff grievance process especially with respect to academic freedom protection, secrecy of outcomes; Provost decides redundancy and also rules on the outcome of any grievance on redundancy; list of issues which can't be grieved etc.
4. **Issue:** Protection of Librarians' academic freedom is not available at UW. Librarians' professional judgement is respected and protected at other academic libraries. Intellectual freedom refers to the protection of expressions of knowledge. This is protected by the Charter and also upheld by librarians. (CLA statement).
5. **Issue:** Inadequate initial vacation entitlement (3 weeks with 4 weeks reached after 8 years employment). This is below the industry standard of 1-month minimum as seen in job ads and other librarian employment agreements.

Appendix 4

Foreword

University of Waterloo policies (http://www.adm.uwaterloo.ca/infosec/Policies/Policies_alpha.htm) provide the authoritative statement of the terms and conditions of employment for all employees of the University. The University of Waterloo Professional Staff Manual was compiled in 1980 (revised in 1986, 1992 and 2002, when the name of the document was changed to Librarians Employment Handbook). Its purpose is to promote a better understanding of, and consistency in, the application of UW policies and other provisions in human resources management that are unique to the Library. The document applies to all library staff employed in positions for which a degree in library and information science is required.

Revisions to the 2002 version were made in 2003/04 as a result of the work of the Ad Hoc Working Group on Librarians' Issues. Members of the committee were:

Lorraine Beattie, Director, Library Resources Management
Jane Britton, Archives Operations Manager
Mark Haslett, University Librarian (Chair)
Christine Jewell, Librarian, Information Services and Resources Department
Jim Parrott, Librarian, Information Services and Resources Department
Susan Routliffe, Assistant Librarian, Information Services
Jackie Stapleton, Librarian, Information Services and Resources Department

The Librarians Employment Handbook (available at <http://www.lib.uwaterloo.ca/staff/manuals/handbook>) is reviewed and approved by the Associate Provost, Academic and Student Affairs and the Associate Provost, Human Resources and Student Services. The University Librarian convenes a Librarians Employment Handbook Review Committee to consider any substantive amendments. The committee would consist of the University Librarian, the coordinator for human resources management in the Library, four librarians (chosen by the librarians) representing various areas of the Library, and consultants as appropriate. Any library staff member to whom the document applies may direct a request for a substantive amendment to the University Librarian. Housekeeping changes (i.e., those that do not modify the intent of the document [e.g., changes in position titles, URLs]) will be made as appropriate.

The *Librarians Employment Handbook* should be reviewed at least every 5 years to determine whether revisions or amendments are required.

Mark Haslett
University Librarian

March 2004

Appendix 5

5.7 Promotions

Within the Library, there are two possible avenues for promotion:

Administrative: this route emphasizes taking on supervisory or managerial responsibilities, providing leadership and direction within an administrative unit, or participating in the general administration of the Library.

Professional: this route emphasizes increased proficiency in job performance and professional activity broadly defined.

A. Administrative Promotion

Administrative Librarians are eligible for promotion through reclassification within the range of grades established for their positions. Such promotions are based on growth in responsibilities. Requests to review changes in the content of a job description are made by the incumbent's Manager to the Director, Library Resources Management, who submits a request to the Human Resources Department for an evaluation of the position in question.

Administrative librarians are also eligible for promotion through professional advancement. See Appendix B (University of Waterloo Library, Professional Advancement: Guidelines and Criteria) for details. The promotion of an administrative librarian through professional advancement is reflected in a move from one salary grade level to the next (up to USG 13) for that librarian. Such promotion does not change the salary classification of the position that the librarian holds.

B. Professional Advancement

Non-administrative Librarians are eligible for promotion through professional advancement. See Appendix B (University of Waterloo Library, Professional Advancement: Guidelines and Criteria) for details.

Appendix 6

5.13 Leaves

The University recognizes that study leaves may benefit the institution, as well as staff members. The Library has a strong tradition of actively supporting professional development. Librarians are expected to engage in activities that enhance their professional development, and participation in such activities is recognized and rewarded. The Library encourages librarians to consider opportunities for leaves. The granting of a leave of absence, with or without pay, will depend upon the conditions specified in University of Waterloo Policies 39: Leaves of Absence for Staff Members and on the Library's and the University's estimation of the value of such a leave to the University as well as to the individual. **[deletion]** The Vice President, Academic, and Provost must give final approval on the terms and conditions of a paid study leave.

A. Study Leave

A librarian may be granted study leave on full or partial salary, depending on the circumstances. Procedures for applying for a study leave are explained below in Appendix C, "Application for Study Leave".

[deletion]

B. Leave without Pay

A librarian may be granted leave without pay for a period of up to one year. There must be an expectation that the librarian will return to the University at the end of the requested unpaid leave. Requests for leave without pay are considered individually on their merits and recommended for approval by the Department Head/Manager. For further details, see University of Waterloo Policy 39: Unpaid Leaves of Absence for Staff Members. (<http://www.adm.uwaterloo.ca/infosec/Policies/policy39.pdf>)

C. Other Leave

(i) University Classes

A librarian may be granted up to three hours within normal working hours each week to pursue University courses that are determined to be of value to the Library. Leave will be granted subject to the approval of the appropriate manager who must ensure that his/her Department continues to offer a normal level of service. The Director, Library Resources Management, must be advised of all such leaves. For further details, see University of Waterloo Policy 4: Benefits to Staff Undertaking Part-Time Educational Programs.

(ii) Observation Leave

The University recognizes that the study of systems, services **or scholarly information resources** may be of benefit to the professional development of a librarian. Therefore, at the discretion of the University Librarian, the University may grant special leave with salary and reimbursement of reasonable expenses for this purpose.

(iii) Conference Leave

Leave with salary may be granted to a librarian for attendance at conferences, meetings, seminars, workshops, and other such activities related to his/her field of specialization. Subject to budgetary constraints, the Library may also grant reasonable expenses, including registration fees.

A librarian who is actively participating in the proceedings of a conference, or officially representing the Library, shall be granted leave with salary. If not reimbursed by the conference organizers, he/she may be reimbursed by the Library for reasonable travel expenses and the registration fee, subject to budgetary constraints.

Applications for “conference leave” are considered by one's Department Head/Manager in consultation with his/her Manager.

Appendix 7

Appendix C

Application for Study Leave

Preamble

The University recognizes that study leaves may benefit the institution, as well as individual staff members. The Library has a strong tradition of actively supporting professional development and encourages librarians to discuss opportunities for leaves with their managers.

General Information

Applications for study leaves submitted by Library staff are reviewed by the Library **Study Leave Review** Committee, an advisory committee to the University Librarian.

The Library Study Leave Review Committee consists of the University Librarian (Chair), the coordinator for human resources management in the Library, the candidate's Department Head/Manager, and three others who have been associated with the candidate in his/her job-related and/or professional activities. The University Librarian, the candidate, and the candidate's supervisor each name one of these three.

The decision to recommend that the Provost grant a study leave rests with the University Librarian. The granting of a leave of absence, with or without pay, is subject to the provisions in University of Waterloo Policy 39: Leaves of Absence for Staff Members. The Vice President, Academic, and Provost must give final approval on the terms and conditions of a paid study leave.

The University Librarian will inform the members of the committee and the applicant of the Provost's final decision.

Procedure

All the information required for the evaluation of an application should be submitted in writing to the applicant's immediate supervisor at least **4** months prior to the date(s) for which the leave is being requested.

Applicants should ensure that their applications are complete, **concise and clear**.

It is the applicant's responsibility to **prepare and review an** application for leave with his/her Department Head/Manager. **The applicant and the Department Head/Manager should discuss means of meeting the needs of a department during a leave. The Library will endeavor to provide means to allow for minimal disruption to departments, subject to budgetary constraints. The application should be discussed and reviewed with the next level of management prior to submission of the final application.**

[deletion]

The following documents should accompany the **final** application **[deletion]**:

1. an up-to-date curriculum **vitae / resume**
2. a summary of the applicant's research project or course of study for which the leave is being requested, including: a clear statement of objectives, any work already completed, and the work to be undertaken during the study leave
3. a summary of the applicant's particular qualifications to undertake the project (e.g. educational qualifications: credit and non-credit, previous related research and publications, relevant employment background)
4. a statement of the expected result of the project, including, where applicable:
 - a. published material
 - b. significance and future use of results
5. a statement of the expected benefits of the study leave to:
 - a. the applicant
 - b. the Library
 - c. the University
6. **where applicable**, a list of agencies to which the applicant has applied for support, and an indication of any funding that has been awarded.
7. **Additional documentation such as the following may be submitted if thought pertinent: letters from colleagues either from within the Library, the University, or the broader academic community; copies of publications, reviews, or presentations; records of committee activities; etc.**

The **applicant** submits the application and the supporting documentation to the Director of Library Resources Management who brings it forward to the **Library Study Leave Review Committee**.

Prior to applying for study leave, a staff member may wish to consult with the Director, Library Resources Management, regarding the application procedure.

Reports

Staff members who are granted study leaves are expected to submit reports to the University Librarian on their return, about their activity while on leave, relative to their original proposals.