

Librarian Workload Policy– University of Toronto Effective April 1, 2024

Preamble:

The workload of University of Toronto Librarians is governed by the Workload Policies and Procedures for Faculty and Librarians (WLPP), a part of Article 6, Memorandum of Agreement between the University of Toronto and UTFA. According to Article 1.2 of the WLPP, workload will be assigned in a manner that is consistent with the principles of a fair, reasonable and equitable distribution of workload and a transparent process of workload allocation.

The University of Toronto Library System:

The University of Toronto Library system is one of the top research libraries in the world. It is a decentralised system composed of the Central Libraries reporting to the University Chief Librarian as well as the Libraries of various Faculties, departments, centres and colleges that report to the University Chief Librarian on Policies for Librarians and on all other matters to their dean or principal. The Policies for Librarians including this Workload Policy apply to all librarians at the University of Toronto.

Purpose of the Workload Policy:

This workload policy was developed to ensure consistent workload norms for Librarians across the University of Toronto Library System. This workload policy shall be reviewed at least every three years. The policy is designed to support Librarians of all ranks, outlining guidelines with respect to Librarians' three principal areas of responsibilities (WLPP 8.0) and workload norms. It is also designed to support Librarians regardless of whether they have permanent status, are in the permanent status stream or have a contractually limited term appointment (CLTA).

Flexibility in workload allocation reflects the mission of the library and is consistent with the diverse nature of librarian appointments and the diversity of their scholarship, and assigned professional practice, and service responsibilities and activities.

Workload Policy Committee:

As described in sections 2.5 and 2.6 of the WLPP: Librarians will be covered by a Librarian Workload Policy Committee that will create and maintain a Librarian Workload Policy, including workload norms, standards or ranges appropriate for the libraries and consistent with the terms of this WLPP and the MOA. The composition of the Librarian Workload Policy Committee will be established through a collegial process that provides a reasonable opportunity for all Librarians to have input regarding which members shall serve on the committee. This will include an email or other written communication to unit members inviting them to put their names forward for consideration. Committee membership should be reasonably reflective of the membership of the libraries, including reflecting the types of appointments that librarians hold and should include representation from UTM, UTSC, and central and divisional libraries. The University Chief Librarian shall be the Chair of the Librarian Workload Policy Committee.

WLPP – Additional Provisions for Librarians ¹

8.1 Librarian workload is a combination of tasks assigned and tasks determined through collegial interaction and self-direction. While the pattern of a librarian's professional activity may vary from individual to individual, the following three activities constitute a librarian's principal responsibilities:

(a) Professional practice for the Library, including teaching that has been requested or approved by a Librarian's manager. In considering the teaching component of normal workload for librarians, relevant factors include the factors set out in Article 4.2, if applicable.

(b) Research and scholarly contributions, including academic, professional and pedagogical contributions or activities

(c) Service, which should be broadly understood to include service to the University, Library and the profession.

8.2 Appointed librarians will have the opportunity to discuss with the appropriate unit head or senior administrator the distribution of their duties, taking into account the need for adequate time to fulfil the 3 principal responsibilities of librarians for the next academic year, at the time of the annual performance review.

8.3 When previously unforeseen circumstances warrant, a librarian may request an in-year adjustment to their agreed workload distribution pattern. Requests for an in-year adjustment will be considered in a manner consistent with the Librarian Workload Policy, the WLPP and the MOA.

8.4 Librarians holding appointments in more than one library unit or Division should be assigned workload in a manner consistent with their percentage appointment in each unit. A meeting involving the librarian and all heads of units to which the librarian is appointed should take place on an annual basis to discuss workload and to resolve any conflicts in expectations between units. A written record of the expectations agreed at the meeting shall be kept by the unit heads and the librarian.

8.5 The workload distribution of a librarian will be taken into account at the time of the annual performance review and a written record will be retained.

8.6 Librarian workloads shall include considerations of reasonable comparability amongst librarians with similar duties in other units.

For clarity: workload should be balanced and recognize the diversity among departments.

Librarian Workload Procedures

Consistent with the WLPP, implementation of the workload policy is as follows:

¹ See *Policies for Librarians, effective January 1, 2024*, for further clarification

The Librarian Workload Policy shall be accessible and communicated annually to all members in the unit.

Unit heads, or those who supervise other librarians, have a responsibility to inform librarians about the WLPP and the Librarian Workload Policy through individual consultations and unit workload meetings for librarians.

The workload of academic librarians is guided by professional standards, service and a commitment to intellectual and academic freedom. This requires transparency, collegiality and a shared responsibility to uphold the principles of equity, fairness, openness and academic values in the workplace.

As defined in article 8.1 of the WLPP, the following three activities constitute a librarian's principal responsibilities:

- (a) Professional practice for the Library, including activities related to collections and resources, administration and professional development, information technology, teaching and curriculum development, research on behalf of the library or other university units, public service and research assistance.
- (b) Research and scholarly contributions, including academic, professional and pedagogical contributions or activities such as publications, editorial and adjudication work, developing subject expertise, bibliographies, conference presentations, research projects and professional creative endeavours.
- (c) Service, which should be broadly understood to include service to the University, Library and the profession, such as participation in university, faculty and library committees (administrative, academic and community related), professional associations (local, national and international), and community associations related to professional and institutional goals and outreach and advocacy.

Librarians' responsibilities will vary according to their assigned duties and collegially determined activities. Responsibilities and goals for librarians will be normally discussed and determined in the collegial process of consultation that occurs between each librarian and the unit head or supervisor(s) at the time of annual reviews. Workload plans, normally a combination of responsibilities in the three areas of professional practice, service and scholarship, are discussed, reviewed and documented as part of the annual performance review.

Librarian workload should be developed through consultation between individual librarians and their managers or supervisors resulting in agreed-upon individual goals and responsibilities that meet each unit's operational requirements and goals. Workload will be consistent with each librarian's position within a unit and the Library's overall strategic goals and priorities.

Each librarian will receive approval of their workload activities, responsibilities and goals on an annual basis by no later than June 30th. Workload should be reviewed and discussed on an ongoing basis, throughout the year.

Librarians shall not be required to carry workloads unreasonably exceeding those of other librarians with comparable duties in the Library unit, or in other units (8.6, WLPP). Assigned duties and the resulting tasks should not require an unreasonable amount of time.

During the course of the year, unforeseen circumstances, leaves or changes in priorities or work assignment may have significant impact on a librarian's previously established plan; resulting changes in requirements and priorities in the workload plan will be documented following consultation and discussion between each librarian and their unit head or supervisor(s).

Assigned duties will vary from one librarian to another, and may also vary from one year to another, depending on the priorities set in each librarian's annual review. In assigning responsibilities, the unit head or supervisor(s) must ensure that the unit's goals, defined collectively by all staff in the unit, are achievable and that there is an equitable workload allocation to achieve the unit's and the Library's service obligations. In addition, balanced workloads should be planned that respect a librarian's desire to fulfill service and scholarship responsibilities.

Self-directed responsibilities will consist of research and scholarly contributions. Service will be largely self-directed; it is expected that service responsibilities will be undertaken after collegial discussion between each librarian and their supervisor.

To ensure transparency, a majority of librarians within a unit will meet at least annually with the unit head or supervisor(s) as a group to plan, set priorities and discuss resulting workload allocations across the unit. All written assignments pertaining to professional practice and service for each unit within the University of Toronto library system will be made readily available for review at the request of any University of Toronto librarian, or of UTFA (2.17, WLPP).

Guidelines for Determining Workload Norms:

Librarians will normally spend approximately 10% - 20% of their time on a combination of service, research and scholarly contributions. The remaining workload (80% -90%) will consist of professional practice for the Library. In assigning these responsibilities the unit head will take into account the expectation that librarians will have time to engage in research and scholarly contributions and service.

The categories of professional practice, research and scholarly contributions, and service are non-exclusive and many librarian activities can reasonably fall into more than one category. This may be taken into account in determining the appropriate balance of workload.

In assigning workload to pre-permanent status librarians, the unit head or supervisor(s) will take into account the needs and the time of the librarian to achieve the criteria and expectations required for permanent status in accordance with the *Policies for Librarians*. Consideration should also be given to the workload of those librarians who are CLTAs.

The needs of Library users, the operating unit, and colleagues must be considered in setting the goals and allocating time to the three principal areas of responsibility. The individual interests, expertise and professional needs of each librarian must also be considered in the distribution of workload. Librarians at different career stages, ranks, and levels of administrative responsibility may wish to allocate time differently, in consultation with the department head/supervisor(s).

Because of the nature of their appointments, librarians have limited autonomy to determine their hours or work assignments/duties. Therefore, it is necessary to ensure that librarians are provided with opportunities to pursue research and scholarly contributions and service.

Librarians holding cross-appointments to more than one unit should be assigned workload in a manner consistent with their percentage appointment in each unit. A meeting involving the librarian and all heads of units to which the librarian is appointed should take place on an annual basis to discuss workload and to resolve any conflicts in expectations between units. A written record of the expectations agreed at the meeting shall be kept by the unit heads and the librarian (6.1, WLPP).

No Conflict with Workload Policy and Procedures for Faculty and Librarians

Nothing in this Policy shall be interpreted to be in conflict with the terms and provisions of the Workload Policy and Procedures for Faculty and Librarians (WLPP) and in the event there is a conflict, the terms and provisions of the WLPP shall prevail.

Dispute Resolution:

Disputes relating to workload shall be resolved according to the procedure outlined in article 10 of the WLPP.

Approved by the Vice-Provost, Faculty and Academic Life: March 1, 2024