

Robin Naughton

Document Everything

A Tenure Tracker for Academic Librarians

“Document everything, and I mean EVERYTHING!” is the advice constantly given to tenure-track faculty. Tenure-track faculty librarians are no exception to the mantra of documenting everything, including simple daily activities and major projects or programs. The tenure portfolio represents years of documented work and experience necessary to achieve tenure. The advice succinctly captures the goal to document work over an extended period spanning multiple years, but that advice rarely comes with a how-to guide or any meaningful suggestion on how to do it. Literature¹ about librarians on the tenure track provides insight into the experience but not a way to document the daily work of trying to achieve tenure. How do you document everything as an academic librarian? What does “everything” entail? Each librarian must figure out the answers to these questions and how to implement the solution for themselves. This article is an attempt, based on my experience, to provide an approach that can help academic librarians on the tenure track implement the advice of document everything by creating a Tenure Tracker and folder structure that are simple and easy to use.

Know Your Tenure Requirements

The advice “document everything” is really a call to track all the activities that are meaningful for tenure, not just the big ones. The tenure requirements for academic librarians differ based on the institution, so it is important that you use the requirements as the starting point in creating your tracker and folder structure. Research, teaching, and service are the three major areas of focus for tenure track at most institutions, but for librarians, there may be variations on the requirements. For example, at my institution, librarianship is a critical component for tenure that addresses the librarian’s role (reference, instruction, web and digital, cataloging, archives, etc.) and daily work in the library, including work as a specialist, department liaison, manager, and member of library committees and administration.

Tenure-track librarians do not need to document each email sent but should track the emails that show activity and accomplishments (thank you, congratulations, acceptance, grants, rejections, etc.). Do track your work process on projects even if the outcome is unsuccessful because knowing that is also important for tenure and professional growth. As you begin tracking your progress, start by getting a copy of the tenure requirements for your institution and determining the main goals and tasks. Based on the requirements, create a tracker and folder structure and use the tracker and folder structure every day on your tenure journey.

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Tenure Tracker

Your tracker can be a simple document or an Excel spreadsheet that documents and keeps track of information on the path to tenure. It is not a project plan, so there is no need to plan projects here, but document project status, date, success, and any general notes. It is not a task list, so there is no need to put a daily to-do list here, but have a list of goals to accomplish over the long term with regular status updates. It is not a notetaking application, but taking simple notes on each activity will help with a quick understanding of each row in the spreadsheet. The tracker is unique to each librarian. It can become complex, but it is best if it remains simple so that it is easy to use every day. It is a documentation method that you can use for the duration of your tenure and beyond. It is best to create one tracker for tenure that consolidates all the critical information to track each day on the path to tenure.

Start with a blank spreadsheet and add a sheet for each area to track based on an understanding of the tenure requirements. The ten sheets shown in Figure 1 offer a place to start and can change based on the librarian's specific tenure requirements:

Administrative Sheets

- **Funding:** Create a sheet to track any type of funding received (startup funds, grants, etc.) with columns that include use of funds, amount, total spent, remaining balance, and notes.
- **Membership:** Create a sheet to track the organizations that you join and pay for membership with columns that include organization, cost of membership, and whether those funds are your own or paid by your institution.

Librarianship Sheets

- **Work Activities:** Create a sheet to track projects, programs, events, and so on related to tenure that is part of the librarian role with columns that include title of activity, description, role, status, and notes.
- **Professional Development:** Create a sheet to track professional development activities attended (conferences, webinars, workshops, etc.) with columns that include date, role, activity, organization, and notes.
- **Subject Liaison:** Create a sheet to track subject liaison work with columns that include the method of communication, any associated funding for collection development, and notes.

Research Sheets

- **Submissions:** Create a sheet to track submissions and outcomes from submitting to conferences, journals, programs, grants, fellowships, and so on with columns that include



Figure 1. Tenure tracker sheets.

year, semester, type of submission, submission guidelines, due dates, expected response, actual response, outcomes, and notes.

- **Places to Publish:** Create a separate sheet to track a list of places to publish research outcomes and publication ideas. Columns include publication, submission guidelines, plan/idea for submission, and completed submission.

Teaching Sheets

- **Teaching:** Create a sheet to track teaching, including library instruction and full courses. This should include information about the course, instructor, number of students, expectations for the instruction, date and time of instruction, and notes.
- **Training/Consultations:** Create a sheet to track any trainings or consultations that outside of library instruction or teaching a course. This should include date, length, number of participants, type of training/consultation, and notes.

Service Sheets

- **Service:** Create a sheet to track service activity, including who the service is for (department, college, university, field, etc.), the name of the activity/event/committee, role and term, status, and notes.

Your Tenure Tracker will grow organically while tracking information on a regular basis. Start with basic requirements and then adjust as the needs develop. Add columns for future tracking when there is missing information. For each sheet, include year and semester so that sort and filter functionality work for any time in the tracker. Include a notes column as much as possible to keep track of thoughts, ideas, and the reasons why to better contextualize the activity. Notes do not have to be long, but always include the date of the note so that when reading the tracker later, there is a dated conversation over time that includes when the note happened and what it meant (e.g., 6/24/25: Working on article for *C&RL News*). Use simple color codes for rows that are quick to see progress, and focus attention on the status of each row in the sheet. Use green rows for “successful,” red rows for “unsuccessful,” yellow rows for “open questions,” white rows for “in progress,” and gray text for “completed” regardless of row color.

Use the Tenure Tracker every day or on most days to keep track of the journey, accomplishments, ideas, and project status. The tracker provides specific documentation about the work process and makes it easier to track everything for the long term. It will also make it easy to use the tracker to submit information into an institution’s tenure system.

Folder Structure

Document everything also relates to keeping digital or physical evidence of activities, such as information about a workshop for the faculty. Creating a folder structure based on the tenure requirements will help with storing information gathered throughout the tenure process. The folder structure can map to major tracker areas to store information regarding librarianship, research, teaching, and service (see Figure 2). Start with the major area folders and build out the subfolders as needed to store documentation. The folder structure should match the needs for tenure and align with the Tenure Tracker so that it is clear where to save information as it happens. Save any piece of information that is relevant to tenure into a

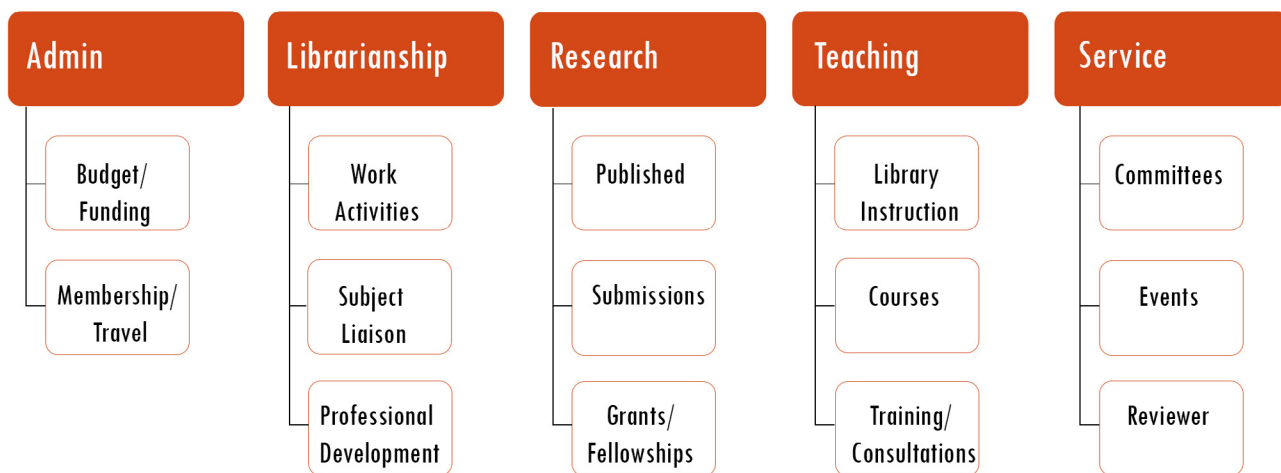


Figure 2. Folder structure for tenure tracking.

folder and find a place to document it on the tracker. Add a link to that document or folder in the tracker for future easy retrieval.

Conclusion

Documenting everything is good advice, but how to document everything is unclear. Creating a Tenure Tracker and an associated folder structure will help tenure-track librarians create a method for continuous documentation. By using the tracker regularly, documentation becomes part of daily practice and happens in real time. When an activity happens, tenure-track librarians will know where to document that activity (Tenure Tracker) and store associated evidence of the activity (folder structure). This can help to relieve stress when organizing a tenure portfolio. Document information as it happens. Do not wait to do it all at once because it will be overwhelming. The Tenure Tracker keeps track of information. It is the metadata of the tenure process. ♪

Note

1. Cynthia Hughes, “A Change of Pace: Successfully Transitioning to Tenure-Track Librarianship,” *Library Leadership & Management (Online)* 32, no. 4 (2018): 1–18; Taylor Ralph, “Approaching Challenges to Tenure: A Fully Remote Librarian Perspective,” *College & Research Libraries News* 84, no. 5 (2023): 5, <https://doi.org/10.5860/crln.84.5.164>; Cynthia A. Romanowski, “First-Time Faculty Librarian, First Year Experience: Overcoming Tenure Fears,” *College & Research Libraries News* 76, no. 11 (2015): 11, <https://doi.org/10.5860/crln.76.11.9414>; Nilda Alexandra Sanchez-Rodriguez, “Mastering the Solo Juggling Act: A Library Manager’s Reflections on Access Services, Tenure, and Liaising for Academic Disciplines – EBSCO,” *Journal of Access Services* 18, no. 1 (2021): 1–16, <https://doi.org/10.1080/15367967.2020.1861951>.