

August 5, 2022

MEMORANDUM

TO: M. Katherine Banks, Ph.D.
President

FROM: N.K. Anand 
Working Group Chair

SUBJECT: Implementation Memo – Working Group #14

Recommendation to be Implemented:

University Libraries will become a service unit led by a University Librarian, reporting directly to the Provost, and will no longer serve as a tenure home for faculty.

Strategic Considerations:

The primary focus of WG14 was to determine the needs of the University Libraries faculty searching for a new academic department home and the needs of faculty transitioning to staff librarians. The Working Group was presented with two options for the faculty.

Option #1: Transfer to an Academic Unit: An academic unit is an existing or to be created in FY 23 department or college/school. Current T/TT and APT faculty members can transfer to an academic unit, with a partial or full-service appointment in the libraries. To maintain neutral or positive salary implications, their current 11-month salary will be paid over nine months. They can potentially earn up to an additional 3-month summer salary through research and/or teaching.

Option #2: Convert to a Staff Position: Current T/TT and APT faculty members can convert to full-time Library staff positions. To maintain neutral or positive salary implications, their appointment will be moved to 12 months (with one-month salary added to their current 11-month appointment term), with vacation accrual and longevity pay. Faculty transferring to staff positions within the libraries will be offered a five-year employment contract, renewable during the fifth year for the next five years, upon satisfactory performance and mutual agreement. As per Section 2 of Texas A&M University System Policy 25.07, the Board of Regents' authorization of the employment contracts is required.

With these two options presented, the members of WG14 focused on the logistics of moving faculty into the departments and the need of creating a supportive structure that recognizes the professional status of librarians at the University. With both initiatives, the objective was to minimize the negative impact on employees, services, and students. The goal of this implementation is to allow the Libraries to focus on continuing to provide and further enhance excellent services to students, staff, and faculty that support both academics and research enterprise.

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Logistical Issues Addressed:

During the spring semester, Libraries faculty determined which department they wanted to meet with and discuss a faculty home. The Libraries Administration scheduled individual meetings with the department head of the chosen department, the faculty member, an advocate of the faculty member's choosing, and representation from the University Libraries Administration and the Vice President for Faculty Affairs office.

At the beginning of these discussions, the Libraries employed 85 faculty members (numbers reflect the College Station, Galveston, and Qatar campuses). Approximately 45 faculty members asked to meet with an academic department. As of May 15, 2022, 24 faculty members had signed transfer documents to move into an academic department. Specifics as to how the faculty would be integrated into each department varied and were specified in their transfer form and followed specifics outlined in my memo titled Transfer Guidelines Library Faculty, dated March 23, 2022. Michelle Mitchell in the Vice President for Faculty Affairs office worked with the Libraries Business Office to transfer faculty salary lines to the appropriate academic departments.

Numbers reflective as of August 5, 2022.

Faculty Status of Faculty Moving to Academic Departments	Numbers
Tenured	13
Tenure-Track	5
Non-Tenure (APT Track)	6-1

Faculty Status of Faculty Moving to Staff Librarian Titles and Remaining 100% in the Libraries	Numbers
Tenured	19
Tenure-Track	7
Non-Tenure (APT Track)	24+1

Faculty Separating from the University as of August 31, 2022	Numbers
Retiring	4
Leaving for another position	6
P&T unsuccessful	1

At their May meeting, the Board of Regents authorized the President to negotiate and execute the new 5-year employment contracts for the 53 tenured, tenure-track, and APT faculty in the Libraries that had confirmed by May 15 that they would remain in the Libraries and transition to staff appointments. Since May 15, one faculty member has asked to void their transfer document so they can become a staff librarian. That individual is not requesting a 5-year contract in the future. Ms. Mitchell worked with the Libraries Business Office to ensure that the Libraries have an extra month's salary for those moving to 12-month staff positions. Since the Board of Regents approved of the 5-year contracts, additional librarians have decided to retire or leave the University.

New staff librarian position titles for the A&M System were developed within the Libraries in consultation with Human Resources and Organizational Effectiveness (HROE). These titles were approved by HROE in mid-June. These titles include University Librarian, Associate University Librarian, Assistant University Librarian, Librarian Director, Senior Librarian, Librarian, Associate Librarian, and Assistant Librarian.

Employment contracts effective September 1, 2022 for the staff librarians have been created and have been approved by the Office of General Counsel. The employment contracts were distributed to the staff librarians on August 5, 2022 for their signatures.

Major Challenges Encountered and Resolutions:

Early in the discussions, it became clear that the expectation of most department heads was for library faculty to integrate significantly in their new department and to teach credit-hour courses. This resulted in none of the faculty transferring to departments with a 100% service appointment to the Libraries. The full-time equivalent (FTE) of the faculty service appointment back to the Libraries is 4.7 FTE.

With the movement of 23 faculty into departments and anywhere between 0-70% service effort, the Libraries will lose expertise and experience. Ms. Mosbo Ballestro, University Librarian and Assistant Provost provided the Vice President of Faculty Affairs office with a request for funding to hire new staff librarians to fill in the needed service gaps. Through this request, \$1.5 million was approved. The Libraries will bridge fund \$1.2M in FY23 from their on-time fund reserve balance. A sum of \$320K will be authorized as new funding in FY23.

While the University Libraries plans for immediate hiring to fill in gaps for services and expertise, they expect to have a decrease in services in FY23 until new librarians are hired. The University Librarian and Assistant Provost will communicate to the colleges, departments, and students as to any changes to services for the fall 2022 semester. Hiring librarians will begin with the new librarian job titles and the staff librarians are currently being transitioned to their new titles in Workday.

Key Logistical Issues to be Completed and Timeline:

WG14 has submitted proposed changes through the Vice President for Faculty Affairs office, all of which are in the process of being reviewed:

1. Proposal to change System Regulation 17.01.01, *Ownership of Intellectual Property and Tangible Research Property*, relating to copyright ownership of pedagogical, scholarly, or artistic works.
2. Proposal to change University Rule 31.08.01.M1, *Staff Emeritus Status*, to extend emeritus status to librarians.
3. Proposed revision to University Rule 12.01.99.M1, *University Statement on Academic Freedom, Responsibility, Tenure, and Promotion*, to extend academic freedom to librarians.

Additional Logistical Issues and Plans:

- With the changes in the Libraries, the University Librarian and Assistant Provost sees opportunities for a reorganization of the reporting structure to better align with the services currently offered and new services being envisioned.
- The University Librarian and Assistant Provost will create a new working group to review and implement ideas suggested in the MGT report, with Libraries staff and stakeholder feedback. Within this new WG, subgroups will be created to focus on each area, such as exploring a future partnership with the Vice President for Research office and Scholars@TAMU, exploring new innovative spaces within the Libraries, determining the academic support to be housed in the Libraries, looking further into the collaborative and individual study needs of students, and exploring the concept of the new building on west campus proposed by MGT (see attached University Libraries Strategic Planning Working Group document).

Timeline for Logistical Issues and Plans:

August 31	The anticipated date for former Libraries faculty to move into offices in new departments; they will retain an office in the Libraries as the Libraries is able and sees fit
September 1	University Libraries finalizes a new organizational structure that will remain flexible while strategic planning occurs in FY23.
FY23	New University Libraries Strategic Planning WG will evolve the Libraries to situate them to further their preeminence as an academic research library. The University Librarian and Assistant Provost will lead the group. This will be an ongoing task. Progress reports will be sent to the Provost, Vice President for Faculty Affairs, and Chief Operating Officer and Sr. Vice President.
Spring 2023	Final recommendations and plan for the evolution of the Libraries with a budget and resource report submitted to the Provost, Vice President for Faculty Affairs, and Chief Operating Officer and Sr. Vice President.

Attachments: University Libraries Strategic Planning Working Group

Approved:



M. Katherine Banks, Ph.D.
President

August 13, 2022

Date

*A new free-standing west campus library facility is not approved at this time; conversations regarding options are ongoing.

University Libraries Strategic Planning Working Group

In May 2022, MGT consultants assessed the University Libraries. The final MGT report included several recommendations and a guide for the Libraries to move the organization towards the goal of building a pre-eminent, 21st Century academic library. Now that MGT's assessment has been reviewed, it has been determined that the Libraries' should resume its strategic planning efforts which began in 2021. These efforts will include the formation of a new working group and to take into consideration of the information provided by MGT as part of the planning process moving forward.

To prepare for fall planning, the University Librarian and Assistant Provost has created a new working group in consultation with Dr. N.K. Anand, Vice President for Faculty Affairs and previous leader of the University Libraries Working Group 14, Tim Scott, Interim Provost and Executive Vice President, and Greg Hartman, Chief Operations Officer. The purpose of this new University Libraries Working Group is to finalize an overarching strategic plan, including specific strategies, actions, and requests for resources to be presented and approved by President Banks in spring 2023.

Given the range of recommendations made by MGT and priorities already identified by the Libraries prior to the MGT report, several task forces will be created to assist the working group. Each task force will be scoped to focus on a core service area or priority. Membership will include library experts and representation from our university collaborative partners as appropriate. Task forces will submit recommendations to the Working Group for review and the reports will include estimated budget, staffing, and space needs required to support their requests.

The **University Libraries Strategic Planning Working Group** will oversee the proposed task forces noted below. This group will also ensure continuity between the strategic planning efforts that the Libraries began in 2021, MGT's work, and the work of the task forces are aligned. This group consists of representatives from:

- University Librarian and Assistant Provost, Julie Mosbo Ballestro
- University Libraries Leadership Team
- Librarians and Library Staff
- Vice President for Research Office
- Faculty Senate
- Council of Principal Investigators
- Undergraduate Students
- Graduate Students
- Academic Success Center

Academic Partnerships Task Force

Goal: Identify strategic university partnerships and potential collaborative services and service initiatives to advance student success.

Students come to Texas A&M University from Texas and beyond and represent diverse perspectives and experiences. The Libraries are uniquely positioned to advance the development and success of the whole student. Within our spaces, students learn, develop community, and build capacity for lifelong learning. We must work to ensure equitable access to all resources and services, taking into consideration the needs, identities, and intersecting group memberships of our students. The Libraries will leverage our resources and expertise to empower students as consumers and creators of

knowledge. The Libraries will nurture existing partnerships and discover new collaborations across campus and beyond to amplify the university's mission to advance student success and prepare students for "leadership, responsibility and service to society."

This task force, comprised of new and existing campus partners, will identify potential in-library collaborative services and initiatives, along with the associated space and resources required to support a holistic approach to student-centered learning, research needs, and wellbeing. This group consists of representatives from:

- University Libraries Leadership Team
- Undergraduate Students
- Graduate Students
- Academic Success Center
- Librarians and Library Staff
- Graduate and Professional Schools

Open Education Resources (OER) Task Force:

Goal: Develop a formalized service definition and programming plan for a Libraries-led OER program for the campus community.

In early 2017, the Texas A&M University Libraries embarked on a modest OER Initiative with a small start-up fund to support the adoption of open access textbooks within targeted 100- and 200-level courses. Since then, the program has grown to save students over \$750,000 annually in textbook costs. Thanks to these early efforts, the library is well positioned to serve as the hub for a more formal, university wide OER program.

This task force will create a formalized service definition and programming for the University Libraries to serve as the hub for the adoption, adaptation, and creation of OERs on campus. Work will include the determination of the positions and resources required to support a full-fledged university-wide program. This group consists of representatives from:

- University Libraries Leadership Team
- Faculty/Faculty Senate
- Provost Office
- Undergraduate Students
- Librarians and Library Staff

Research/VPR Collaborations

Goal: Identify ways to strengthen ties to the VPR Office and its constituents through more formal communication channels, initiatives, and targeted services, programming, and outreach efforts.

Texas A&M University's community of scholars advance human knowledge through interdisciplinary innovation and rigorous inquiry. Our faculty engage with a robust array of funders, collaborators, and communities to address global challenges. However, these researchers face obstacles such as a competitive funding landscape, an increasing demand for open research by agencies and publishers, and a need for accountability and transparency throughout the research lifecycle. To that end, the Libraries' collections, services, and information specialists should actively support the research environment and position the Libraries as partners in the research enterprise.

This task force will specifically explore ways in which the Libraries' can strengthen and formalize ties to the VPR Office and its researcher constituency to gain greater insight into researcher needs and respond accordingly through the development and enhancement of services, programs, and outreach efforts such as the areas of data management, scholarly communications, open access, digital scholarship, and Scholars@TAMU, to name a few. This group consists of representatives from:

- University Libraries Leadership Team
- Vice President for Research Office
- Librarians and Library Staff
- Faculty/Faculty Senate
- Council of Principal Investigators
- Graduate Students
- University Libraries Information Technology
- University Research Council

Spaces

Goal: Provide prioritized list of space needs for the Libraries' public learning and study spaces, including specific recommendations for new spaces, modifications, relocations. Recommendations should take into account the MGT report, user-centered data and feedback gathered by the Libraries, as well as embrace universal design principles to maximize access to the Libraries' physical locations on campus.

The task force will review and assess current library space needs, as well as the recommendations from the MGT report. Work will include the consideration and feasibility of new and/or enhanced library-based maker spaces and services (3D printing, AI, Historical Press, The Studio, etc.) that respond to core curricular needs of the campus community. The task force will also specifically assess the efficacy of current library study and learning spaces, both collaborative offerings (group study, instructional, cross-disciplinary, and disciplinary neutral) and individual study space options to make recommendations for enhancements and additions accordingly. This group consists of representatives from:

- University Libraries Leadership Team
- Undergraduate Students
- Librarians and Library Staff
- Academic Success Center
- Undergraduate Students
- Graduate Students
- University Libraries Facilities
- University Libraries Information Technology
- University Information Technology

Collection Relocation

Goal: Develop an implementation plan and timeline for the transfer of on-site library collections to our off-site storage facility.

As part of the Libraries' collection assessment program, select print serials and monograph collections are reviewed on an annual basis. The purpose of this ongoing assessment is to enhance on-site access to high-demand and high-value print research materials, as well as repurpose physical space to respond to the increasing need for student study areas and accommodate the growth of new library services and programs. With space at a premium on campus and the student population continuing to increase, this

group will work to increase the speed at which we are able to relocate low-use/low-impact print resources to our off-site storage facility. Collections relocated to off-site storage undergo careful review by our experts and remain available for check out through our Joint-Library-Facility (JLF).

This task force will gather required data to develop a cost estimate for an expedited out-sourcing project to process already identified collections for relocation to JLF and implement the plan upon approval and funding. The task force will also consider the need for a fourth module of JLF. This group consists of representatives from:

- University Libraries Leadership Team
- Librarians and Library Staff
- Faculty Senate
- Graduate Students

New Campus Library

Goal: Explore the recommendation made by MGT for an all-inclusive library on the west side of campus.

This task force will identify the current use of the Business Library and Collaboration Commons, Policy Sciences & Economics Library, and Medical Sciences Library and identify library needs and support for all users on West Campus. The task force will identify the space needs, services, partnerships, etc. required for a new library and an estimated budget and potential donor engagement. This group consists of representatives from:

- University Librarian and Assistant Provost, Julie Mosbo Ballestro
- University Libraries Leadership Team
- Librarians and Library Staff
- University Facilities
- University Libraries Facilities