

# Texas A&M University Libraries

## Staff Guidelines

### Tables of Contents

1. <a href="#">Purpose</a> .....	3
2. <a href="#">Texas A&amp;M University Governance</a> .....	3
3. <a href="#">Membership and Privileges</a> .....	3
a. <a href="#">Employees</a> .....	3
i. Librarians	
ii. Library Professionals	
4. <a href="#">Libraries Structures</a> .....	4
a. <a href="#">Organizational Structure</a> .....	4
i. Division	
ii. Department	
iii. Section	
iv. Service/Program	
v. Functional Team	
b. <a href="#">Shared Governance Groups</a> .....	5
i. Advisory Groups	
ii. Task Forces	
iii. Committees/Councils	
c. <a href="#">Committees and Charges</a> .....	6
i. Organization	
ii. Committees	
5. <a href="#">Promotion and Evaluation Procedures</a> .....	9
a. <a href="#">Evaluation</a> .....	9
b. <a href="#">Basic Requirements for Promotion</a> .....	10
i. Time & Professional Experience	
ii. Positive Performance Record	
iii. Change in Position Responsibilities	
c. <a href="#">Defining Professional Contributions and Engagement</a> .....	11
d. <a href="#">Librarian Career Ladder and Criteria for Promotion</a> .....	12
i. Assistant Librarian	
ii. Associate Librarian	
iii. Full Librarian	
iv. Senior Librarian	
e. <a href="#">Steps of the Promotion Process</a> .....	15
f. <a href="#">Calendar for the Evaluation and Promotion Process</a> .....	18
g. <a href="#">Conflicts in Evaluation and Promotion Process</a> .....	19
6. <a href="#">Review and Modification of Guidelines</a> .....	19
7. <a href="#">Appendix A - Professional Development Committee Guidelines</a> .....	20
8. <a href="#">Appendix B - Mentoring Guidelines</a> .....	22

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# Purpose

The Texas A&M University Libraries Staff Guidelines (hereafter referred to as Guidelines) shall identify and describe the advisory bodies to the University Librarian, the rights and responsibilities of staff, and guide in the appointment and conduct of committees and other groups. **These Guidelines were created locally for the Texas A&M University Libraries in College Station. While other Texas A&M System libraries are welcome to reference these Guidelines, the Guidelines are not prescriptive for these bodies, especially in regards to promotion and evaluation. Libraries outside of College Station will follow their local library and HR guidelines for promotion and evaluation.**

# Texas A&M University Governance

The Texas A&M University Libraries (hereafter referred to as Libraries) is a unit of the Texas A&M University System and Texas A&M University; therefore, it conforms to all [University Rules and SAPs](#). The Libraries shall make no policies or procedures that conflict with, or are less restrictive than, the Board of Regents (BOR) or the University.

# Membership and Privileges

## Employees

Staff who work in the Texas A&M University Libraries are governed by the Division of Human Resources and Organizational Effectiveness (HROE). Internally, employees are considered:

## Librarians

This staff employee group participates in the development and implementation of Library programs and services to meet the diverse needs of students, faculty, and staff. This group includes the following titles: Assistant Librarian, Associate Librarian, Librarian, Senior Librarian and Librarian Director. Executive leadership titles include Assistant University Librarian, Associate University Librarian, and University Librarian.

## Library Professionals

This staff employee group participates in the academic and administrative functions of the Libraries. Library Professionals perform work that includes, but is not limited to, the following: business operations, information technology, research, client services, processing, service/maintenance, purchasing, and accounting.

All librarians and library professionals (dotted or solid line reporting) are eligible to participate in

the Libraries' shared governance, which may include committee service and voting privileges.

# Libraries Structures

## Organizational Structure

### Division

- Group on the organizational chart under the direction of an Assistant University Librarian or Associate University Librarian (AUL)
- A library employee is a part of a division unit based on reporting lines within the org chart
- There are 7 divisions within the Libraries. They are: Special Collections and Archives; Information Access, Discovery, & Stewardship; Academic Engagement; Research & Digital Scholarship; Health Sciences & Veterinary Medicine; Organizational Development & Planning; and Implementation & Sustainability Strategies.

### Department

- Led by a Director, there can be multiple departments in a division
- Examples of departments within the Libraries: Learning & Outreach, Acquisitions & Collection Strategies, Business Library & Collaboration Commons, Research Data Management Services

### Section

- Part of a department, led by a Coordinator; not all departments have sections
- Examples within the Libraries include Archival Processing, Digitization & Digital Preservation, Adaptive Cataloging, and Academic Success\

### Service/Program

- Part of a section, led by a Leader
- Leads a team dedicated to a specific library function

### Functional Team (organizational term)

- Individuals with a common purpose or set of skills with mutual accountability for providing a particular service or program
- Members are on the team by virtue of their functional duties in the Texas A&M University Libraries
- They might not have regular meetings, but can meet as necessary and call upon each other as needed
- Leadership may be formal or informal. Facilitators may organize activities or team members may collaborate amongst themselves

- Created by library administration. If a new functional team is desired, the requester should speak with their appropriate AUL or University Librarian.
- Examples: Reference, Circulation, Subject Librarians, Cataloging, etc.

## Shared Governance Groups

### Advisory Groups

- Appointed, standing, representative groups that advise and give their perspective on library programs, services, spaces, etc.
- Commonly includes members outside of the organization such as students, faculty, etc.
- Members are appointed based on their expertise or station and the members are expected to communicate on behalf of their respective groups
- Leadership is formalized through the library administration. Any advisory group formed should seek approval from library administration.
- Created by library administration. If a new advisory group is desired, the requester should speak with their appropriate AUL or University Librarian.
- Examples: Library Student Advisory Group

### Task Forces

(works as a project team, these have also been called working groups and project teams in the past)

- Appointed group of people assigned to a particular task or problem based on their areas of expertise or interest. Could include a call for volunteers, if applicable.
- These groups are short term and should be disbanded when the task is complete
- Leadership is commonly established upon Task Force creation, but members can develop co-leaders or other leadership roles to facilitate the work.
- At the end of a project, a final report or document is produced summarizing the actions of the task force. Upon completion of this document the task force is officially considered disbanded. Within this document, a plan for the sustainability of the project should be created (if needed). This may involve certain outstanding tasks and/or transferring recommendations to another team, committee, unit, advisory group, etc.
- Created by Supervisor or Project Leader with approval from appropriate Managers, AUL(s), or other personnel.
- Examples: FOLIO Transition Team, OPAC Taskforce, Committee on Committees Task Force, etc.

### Committees/Councils

- Representative group of people who are elected
- Tasked to address recurring need within the University Libraries and to work with ongoing projects and initiatives within the committee
- Standing groups with formalized leadership (Chair, Secretary, etc.)
- Members have set term lengths

- Should submit periodic reports to those that they represent
- Created by the University Librarian or based on recommendation by the Staff Advisory Council (SAC). If a new committee is desired, the requester can approach either the University Librarian or the SAC.
- SAC is responsible for facilitating annual elections for all committees
- Examples: Mentoring Committee, Staff Advisory Council
- A list of all standing committees, their charges and membership are listed at: <https://hub.library.tamu.edu/Groups/AppointedElectedCommittees/SitePages/Home.asp>

## Committees and Charges

### Organization

#### Meetings

Unless otherwise specified, all committee meetings shall be open. Committees will use the latest edition of [\*Robert's Rules of Order\*](#) for operational guidance in governance matters. A quorum for holding committee meetings and voting shall consist of one-half plus one of eligible members. Unless otherwise specified, all issues and elections requiring a vote shall be decided by a simple majority of those voting.

#### Membership

Terms of committee membership shall be for two years. Members who have served for two years must take a one year sabbatical before being eligible to be re-elected to a committee. Two-year terms shall commence on September 1st. Should a committee member be unable to fulfill their term, an election will be conducted to determine a successor who will serve for the remainder of the previous member's term.

Initial members of a new standing committee shall meet and draw lots to determine which individuals will serve one-year and two-year terms.

#### Officers

Officers in committees will be chosen by committee members during the committee's initial meeting in September.

#### Chair

This position is a one-year term with the opportunity to serve for an additional year.

Duties: conducts the monthly meetings, sets the agenda for meetings, oversees the activities of the committee, delegates responsibilities as necessary, and calls special meetings of the committee; attends monthly meetings of SAC to report on business of the committee; and submits agenda items for the University Librarian's Town Hall.

#### Secretary

This is a one-year term with the opportunity to serve for an additional year.

Duties: records and distributes official minutes and facilitates annual review of associated committee content in TAMU Libraries Staff Guidelines at September meeting and sends proposed changes to SAC.

## **Elections**

The Secretary of SAC facilitates all election communication for committees.

By April 15th: Chairs of committees send expected vacancies to the Secretary of SAC.

By May 1st: Email is sent to library staff asking for nominations. This email should include a roster, for each committee, that includes:

- Name of committee
- Required compositions of the committee (i.e. 2 librarians, 3 library professionals)
- Returning members with their employee category and term
- Members that cannot be re-elected due to term limits with their employee category and term

June 1st: All nominations should be received.

June 15th: The electronic ballot is then finalized and sent to library staff. Anonymous voting will be open for ten working days. A reminder email will be sent out halfway through the voting period. At the end of the voting period results of the election and an updated committee roster will be emailed to library staff.

Committee membership terms start September 1st.

## **Committees**

### **Staff Advisory Council (SAC)**

The Staff Advisory Council (SAC) serves as a deliberative and advisory body to the University Librarian on matters of significant interest and importance to the staff of the Libraries. The SAC encourages input from staff, development of ideas, and generates recommendations for improvement of the Libraries. The SAC is also responsible for maintaining and reviewing the Guidelines.

The Council does not replace the established channels for employee disputes handled by Human Resources & Payroll. In the event of a complaint or grievance, library staff should follow the [Complaint & Grievance Process for Nonfaculty Employees](#).

The regular meeting of the Council will be held monthly with the University Librarian in attendance on a day to be determined by the Council at its September meeting. Special called meetings can be held at any time. All meetings of the SAC are open to all members of the

Libraries' staff. Chairs of standing committees will attend SAC meetings and provide updates.

Membership of the SAC consists of seven members and a potential eighth non-voting member. Seven members will be elected and include three librarians, three library professionals, and the Libraries' elected representative on the University Staff Council (USC). At the University Librarian's discretion and appointment, a faculty member with service to the Libraries may be added to the SAC as a non-voting eighth member. A quorum is required for an official meeting of the council.

### **Inclusion Accountability Council (IAC)**

The Inclusion Accountability Council (IAC) is responsible for helping increase awareness of issues relating to Diversity, Equity, and Inclusion (DEI). The committee collaborates with groups both within and outside the Libraries' to determine best practices for collecting and reviewing DEI metrics for the annual Diversity Accountability Report. The group will serve as a resource for library employees on DEI matters and identify and recommend policy changes and organizational actions which promote Equity and Inclusivity.

Membership will consist of the Program Coordinator for Diversity and 7 elected members, 3 of whom shall be library professionals and 3 shall be librarians. At the University Librarian's discretion and appointment, a faculty member with service to the Libraries may be added to the council as the eighth voting member.

### **Professional Development Committee (PDC)**

The Professional Development Committee (PDC) assumes the role of hosting and arranging diverse programming with professional development content throughout the year. Responsibilities include maintaining and monitoring professional organizations for relevant training opportunities, maintaining a calendar for application deadlines for regularly offered opportunities and sending reminders to staff, arranging training for products commonly used in the Libraries, and arranging informational sessions where employees can share relevant courses/sessions/training that others might learn from. The committee will maintain a procedures document and ensure information on the Libraries' intranet is up to date.

The committee shall consist of 5 members, at least one shall be a librarian and at least one shall be a library professional.

### **Mentoring Committee**

The Mentoring Committee assists new employees in orientation and assimilation into the TAMU libraries and university culture. The committee also assists more experienced employees who seek career advancement. The committee facilitates matching mentoring/protégé pairs to help everyone achieve their full potential as library employees. This committee will evaluate the mentoring program, communicate with the Libraries' Business Office in regards to mentoring funds, encourage educational and sharing opportunities, and maintain a procedures document and ensure information on the Libraries' intranet is up to date.



Membership will consist of five elected members, at least two of whom have worked in the Libraries for at least 5 years, and at least one member shall be a library professional and at least one member shall be a librarian. The committee shall also consist of one ex-officio member, the Human Resources liaison.

## Promotion and Evaluation Procedures

### Evaluation

All library staff will follow the TAMU Human Resources guidelines for annual Performance Review processes. The [HR website](#) has more information about the evaluation process, [performance management forms](#) including the self evaluation, and a [calendar](#) for the annual evaluation process.

Components of the evaluation:

- The librarian turns in a self evaluation (required) and a CV (strongly recommended)
  - Ratings for Core Competencies
  - Ratings for Position Responsibilities (includes contributions to the profession)
  - Overall Rating
- The supervisor may request feedback from others during the evaluation process through Workday (optional)
- The supervisor provides ratings and commentary for the aforementioned sections (required)

### Core Competencies

Texas A&M has identified the following core competencies and definitions for all staff. These are individually rated during the annual review process. Job duties and professional contribution and engagement activities may be used as examples of how these core competencies are manifested in the librarian's library work.

HR has provided an overview of the [evaluation competencies and rating system](#).

**Service:** Promotes a culture of service. Some examples include: Responds appropriately to the needs of internal and external customers; Seeks to secure positive interpersonal relations; Represents one's position, work unit and organization both internally and externally professionally and responsibly.

**Teamwork/Collaboration:** Promotes cooperation and effective relationships. Some examples include: Works in a cooperative and collaborative manner within work unit and across the organization; Shares relevant information accurately, completely and appropriately; Manages interpersonal conflicts constructively.

**Diversity & Respect:** Promotes an inclusive, welcoming and diverse climate. Some examples include: Treats all people with dignity, civility, and fairness; Demonstrates respect for people of

diverse backgrounds, viewpoints, needs, and experiences; Acknowledges ideas from others, even when different from one's own.

**Initiative:** Exhibits resourcefulness, independent action and professional judgment that are position appropriate. Some examples include: Actively engages in activities that support the organization's mission and goals; Strives toward excellence in all tasks and responsibilities; Uses time efficiently and displays commitment to self-improvement.

**Accountability:** Acts responsibly and takes ownership of own behavior, actions and decisions. Some examples include: Delivers quality and timely work products and services; Complies with applicable policies, regulations, rules, procedures; Leads by example in appearance, attitude, character and work ethic; Completes assigned training on time.

If applicable the librarian will also be rated on the following:

**Supervision:** Manages performance and cultivates a positive work environment. Some examples include: Promotes employee excellence by establishing appropriate performance goals and assignments; providing coaching, feedback and support; and rewarding high performance; Provides clear direction and communicates expectations.

**Organizational Leadership:** Cultivates a high-performing and fiscally responsible workplace. Some examples include: Communicates, supports and promotes the organization's vision, mission and goals; Plans and monitors work activity and output, ensuring alignment with overall goals; Acts as a change agent by demonstrating flexibility and adaptability, and by implementing appropriate changes in culture, strategy and regulatory requirements.

## Basic Requirements for Promotion

The formal promotion process must be initiated by the supervisor in Workday. However, librarians are encouraged to be in conversation with their supervisor to discuss the promotion process and whether the supervisor has seen growth and believes the librarian's job duties are congruent with the requirements of the next step in the career ladder.

In order to be eligible for promotion, the librarian must meet the following basic HR requirements:

### Time & Professional Experience

- The required level of experience for the position title includes previous library experience and is not limited to your time at A&M. For example, if you have been a librarian for five years, you do not have to have been employed as a librarian at A&M for five years to be eligible for promotion. The required experience is inclusive of all of the librarian's experience.
- Professional experience is defined as relevant experience post professional degree or certification. The hiring supervisor will define the years of experience in the offer letter at the time of hire.

- Librarians must have education and experience and other qualifications that meet or exceed the minimum required qualifications as documented on the position description.
- Librarians must have been employed in their present position for at least three months. An exception to the three-month requirement may be approved by the President or designee.
  - Note: If the librarian is hired after yearly evaluations are completed, they are encouraged to wait until the following year and one yearly evaluation cycle until considering promotion.

## **Positive Performance Record**

- Librarians being proposed for promotion must also have an (overall) satisfactory record of performance from the previous year. Must be above Meets Expectations on the overall yearly evaluation from the previous year.
- Librarians will be evaluated using the Performance Management process. Elements of performance feedback include:
  - Goals (optional)
  - Core Competencies as identified by Texas A&M
  - Position Responsibilities
    - Duties as defined in the position description, which will include a percentage range for Professional Contributions and Engagement
  - Overall Performance Rating

## **Change in Position Responsibilities**

- The librarian must show that they are meeting or have the potential to meet the position responsibilities for the next level of the career ladder.

## **Defining Professional Contributions and Engagement**

Librarians in the Librarian career ladder should demonstrate a commitment to development and engagement throughout their careers. In recognition that these activities are vital to the health of our field and expected by the profession as a part of the career progression of librarians, the University Libraries supports librarians in these efforts. The University Libraries and individual library supervisors also acknowledge that contributions to the profession may look different for each librarian, as considerations for individual interests, strengths, goals, and position responsibilities must be considered. Professional contributions and engagements will appear on librarians' position descriptions as a ranged percentage of effort (5 - 20) and should be discussed and adjusted as needed with the supervisor as a regular part of the evaluation and promotion processes. Professional contributions and engagement activities are not a separate evaluation category, but are evaluated as a function of the core competencies and position responsibilities during the prescribed yearly evaluation process.

Professional contributions and engagement activities are broadly defined in recognition of the variety of responsibilities and work within the library, archival, and information science fields. Activities undertaken by librarians should contribute to professional knowledge, service, or

practice, enhance the reputation of the university, and/or strengthen the librarian's ability to fulfill their responsibilities.

The following list provides descriptive examples, but is not intended to be comprehensive of all possible activities.

- Contributions to professional discourse such as newsletters, blogs, articles, books, edited works, posters, presentations, websites, lectures, etc.
- Engagement, participation, and/or leadership in professionally relevant organizations, including local, university, state, regional, national and international organizations
- Service to the scholarly and research communities, especially those that contribute to the impact and enhancement of the University and University Libraries
- Significant professional development that leads to enhanced position responsibilities such as advanced training or certification in specialized areas
- Compelling innovations and developments that enhance library collections, service, programs, or workflows. These could be at the local, state, national or international level
- Development of new technologies or standards that significantly contribute to the field
- Recognition of expertise that results in consultantships, honorary positions such as board memberships, or editorships
- Participation in or support of grant related activities such as authorship of grant proposals, members of project teams, or serving on review panels
- Professional mentorship
- Active support and participation in University initiatives that forward the mission and goals of the University and University Libraries
- Receipt of awards, grants, fellowships or other recognition of significant contributions

## **Librarian Career Ladder and Criteria for Promotion**

The position responsibilities below are written so they are widely applicable and address different positions across the libraries. The librarian is meant to demonstrate the level of work commensurate with the level in the career ladder, not necessarily all of the individual duties listed in the position responsibilities below. Librarians are expected to promote from level to level in the career ladder with the atypical occurrence of exceptional cases for equity adjustment.

### **Assistant Librarian**

#### **Expectations:**

These are the expectations for Assistant Librarian :

- Required experience: Entry level. No professional librarian experience required. Professional degree or certification required.
- Position responsibilities: The Assistant Librarian, under direction, participates in the development and implementation of Library programs and services to meet the diverse needs of students and faculty. Maintains knowledge of library technology applications, resources, copyright, systematic reviews, and other

issues/ trends in the libraries and/or archives. May perform tasks in one or more functional areas within the Library.

- Contributions to the profession:
  - Explores areas of interest in professional contributions and engagement activities
  - Shows evidence of potential growth
- Core competencies: The Assistant Librarian should receive an overall rating of at least Meets Expectations in their evaluation.

### Criteria for advancement to Associate Librarian:

- Required experience: Five years of relevant professional experience post professional degree or certification
- Position responsibilities: The Associate Librarian, under direction, coordinates the development and implementation of Library programs and services to meet the diverse needs of students and faculty. Coordinates and/or provides expertise to the functions and responsibilities of an area. Assists in the recruitment and staff development of Library staff members.
- Contributions to the profession:
  - Active participation in professional contributions and engagement activities at any level
  - Demonstrates evidence of continuing growth and development
- Core competencies: The evaluation from the previous year must have an overall rating of Exceeds or Significantly Exceeds Expectations.

## **Associate Librarian**

### Expectations:

- Required experience: Five years of relevant professional experience post professional degree or certification
- Position responsibilities: The Associate Librarian, under direction, coordinates the development and implementation of Library programs and services to meet the diverse needs of students and faculty. Coordinates and/or provides expertise to the functions and responsibilities of an area. Assists in the recruitment and staff development of Library staff members.
- Contributions to the profession:
  - Active participation in professional contributions and engagement activities at any level
  - Demonstrates evidence of continuing growth, development, and/or expertise
- Core competencies: The Associate Librarian should receive an overall rating of at least Meets Expectations in their evaluation.

## Criteria for advancement to Full Librarian:

- Required experience: Seven years of relevant professional experience post professional degree or certification
- Position responsibilities: The Full Librarian, under direction, manages, and/or provides expertise to a functional area within the University Libraries. Plans, develops, and manages Library functions and performs specialized Library work. May supervise Library personnel.
- Contributions to the profession:
  - Evidence of leadership, initiative, and/or significance in professional contributions and engagement activities
  - Demonstrates a sustained record of growth, development, and/or recognized expertise in a specialized area
- Core competencies: The evaluation from the previous year must have an overall rating of Exceeds or Significantly Exceeds Expectations.

## Full Librarian

### Expectations:

- Required experience: Seven years of relevant professional experience post professional degree or certification
- Position Responsibilities: The Full Librarian, under direction, manages, and/or provides expertise to a functional area within the University Libraries. Plans, develops, and manages Library functions and performs specialized Library work. May supervise Library personnel.
- Contributions to the profession:
  - Evidence of leadership, initiative, or significance in professional contributions and engagement activities
  - Demonstrates a sustained record of growth, development, and/or recognized expertise in a specialized area.
- Core competencies: The Full Librarian should receive an overall rating of at least Meets Expectations in their evaluation.

## Criteria for advancement to Senior Librarian:

- Required experience: Ten years of relevant professional experience post professional degree or certification
- Position responsibilities: The Senior Librarian, under direction, serves as lead and technical expert to a functional unit within the University Libraries. Plans, develops, and administers Library functions and advises and consults on Library issues. May supervise Library personnel.
- Contributions to the profession:
  - Professional contributions demonstrate excellence and exceptional merit
  - Demonstrates sustained growth, development, and/or recognized expertise in a specialized area

- Core competencies: The evaluation from the previous year must have an overall rating of Exceeds or Significantly Exceeds Expectations.

## Senior Librarian

### Expectations:

- Required experience: Ten years of relevant professional experience post professional degree or certification
- Position responsibilities: The Senior Librarian, under direction, serves as lead and technical expert to a functional unit within the University Libraries. Plans, develops, and administers Library functions and advises and consults on Library issues. May supervise Library personnel.
- Contributions to the profession:
  - Professional contributions demonstrate excellence and exceptional merit
  - Demonstrates sustained growth, development, and/or recognized expertise in a specialized area
- Core Competencies: The Senior Librarian should receive an overall rating of at least Meets Expectations in their evaluation.

### Advancement Opportunities:

Senior Librarian is the last level in the librarian career ladder. Senior Librarians may wish to apply for an open Director, AUL, or UL position or may remain as a Senior Librarian with opportunities to grow in their position.

## Steps of the Promotion Process

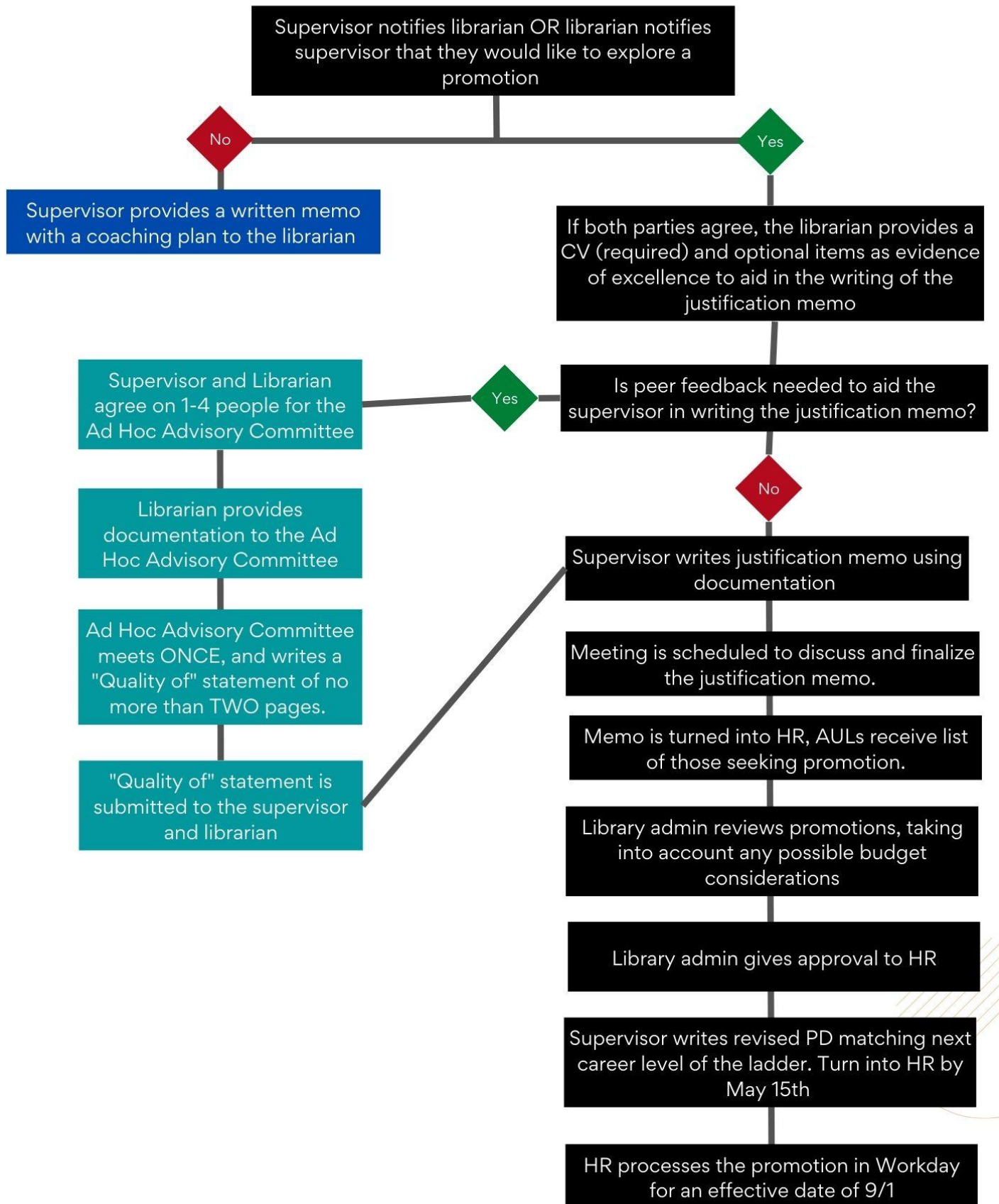
While the yearly performance review process focuses on the librarian's accomplishments for the year-long period, the promotion process should take into consideration the librarian's holistic career growth and development. Therefore, additional documentation may be warranted. All documentation and supplementary materials are in service of the Justification Memo that is required by the HR process for promotions.

1. The supervisor notifies the librarian OR the librarian notifies the supervisor that they would like to explore a promotion.
2. If the supervisor does not agree to promotion in the current evaluation cycle, then supervisor provides a written memo with a coaching plan to the librarian
3. If both parties agree to move forward with the promotion process, then...
  - a. The librarian provides documentation to their supervisor to aid in the writing of the promotion process. Documentation may include items such as:
    - i. **Required:** An updated CV ([required for HR verification](#), contact Library HR with questions)

- ii. **Optional:** Evidence of excellence such as thank you letters, correspondence with a journal editor, student feedback, scholarship, assessments, etc.
  - 1. The supervisor and librarian should discuss if there are any aspects of their promotion case that would benefit from the feedback of others. Examples could include;
    - a. the librarian may have professional contributions and engagement activities in subfields of library and archival work that are different than their supervisors, OR
    - b. the librarian has worked with others in the Libraries or the University who could provide additional insight on aspects or the quality of the librarians' work
  - 2. The supervisor and librarian may develop an Ad Hoc Promotion Advisory Committee member(s) (1-4 individuals internal to the University that can provide context)
    - a. The librarian and the supervisor will select an equal number of individuals for the committee, but no more than four total. The supervisor will be the point of contact for Ad Hoc Committee members, establish the deadline, and convene the meeting.
    - b. If applicable, librarians provide documentation to Ad Hoc Committee (supervisor should have everything as well)
    - c. Ad Hoc Committee meets once to discuss documentation. Writes a "quality of" memo not to exceed 2 pages and submits to supervisor and librarian
- 4. Supervisors draft the Justification Memo using any relevant documents provided by the librarian, their previous evaluations or supervisors notes, and Ad Hoc Promotion Advisory Committee (if applicable),
  - a. The draft is shared with the librarian and a meeting is scheduled between the supervisor and the librarian to discuss and finalize the Justification memo
- 5. Supervisor turns in Justification memo to HR.
- 6. Library administration checks in with relevant supervisors to see who in their units are seeking promotion.
- 7. HR provides a complete list of those seeking promotion to AULs, including justification memos. Budget considerations for salary increases are also given to library administration for review.
- 8. Library administration gives approval to HR.
- 9. HR provides supervisors guidance on how to write a revised PD that matches the next level of the career ladder.
- 10. HR processes the promotion in Workday for an effective date of 9/1.



# Steps of the Promotion Process



## Calendar for the Evaluation and Promotion Process

The promotion process **must be completed by May 15th**. If documents are submitted after the final deadline, then the promotion **cannot** be processed for the current year.

<b>Timeline</b>	<b>Activity</b>
<b>December 15</b>	Supervisor and librarian discuss intent to submit materials for promotion by December 15th.
<b>January</b>	Documentation is gathered by the librarian and given to the supervisor by the end of January.
<b>February</b>	If an AdHoc committee is requested, they meet and write the “quality of” statement during the month of February.
<b>March</b>	The supervisor must write the justification memo and meet with the librarian to review it by March 15th.
<b>March 31</b>	The supervisor must submit the justification memo to the AULs by March 31st.
<b>April 30</b>	HR receives the full list of approved promotions from the AULs
<b>May 15</b>	The supervisor will revise the librarian’s PD and submit it to HR no later than May 15th.
<b>June 15</b>	HR processes the promotion in Workday so it is effective September 1st.

## Conflicts in Evaluation and Promotion Processes

If there are concerns of a rating on an evaluation or not receiving a promotion there will be several opportunities to address those concerns. Additional information is available in the [SAP](#).

### Evaluation:

1. Prior to the submission of the evaluation, the supervisor and the Librarian MUST discuss the final evaluation.
  - a. If the supervisor's rating is the same or within one difference from the librarian's no changes are needed.
  - b. If the supervisor's rating is 2 rating scales different from the Librarian's the supervisor and Librarian should converse on why there are differences. The supervisor should adjust their rating if deemed appropriate.
    - i. Ex. The supervisor did not have enough information to appropriately rate the librarian.
    - ii. Ex. The librarian did not meet the actual expectations of a competency or their responsibilities.
  - c. If there are continued issues with the rating, the Librarian may reach out to Human Resources to discuss further.

### Promotion:

1. If a promotion is deemed not applicable at this time the supervisor should provide a justification and a coaching plan to the Librarian.
  - a. If the justification does not match, or the denial of a promotion seems unjustly stated the Librarian should speak with their supervisor to get clarification.
  - b. If there are continued issues the Librarian should contact Human Resources.

## Review and Modification of Guidelines

Committees will review their associated content in the Guidelines annually during September committee meetings. SAC will collate all changes during their October meeting and submit all proposed changes to library staff for review and vote, which will be approved by a simple majority of those voting. During the year, any library staff member may submit a proposed change to the Guidelines through SAC. The University Librarian will have final approval of all changes.

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Adopted and Approved by Vote: October 17, 2022

# **Appendix A - Professional Development Committee Guidelines**

## **Definition of Professional Development**

Professional development refers to continuing education and career training after a person has entered the workforce in order to help them develop new skills, stay up-to-date on current trends, and advance their career.

Beyond continuing education, professional development can refer to many different types of educational or training opportunities relevant to the professional's work. Even when not required, many professionals who want to excel in their career will voluntarily seek out professional development and learning opportunities.

## **Purpose of Professional Development**

The purpose of professional development is to give employees the opportunity to learn and apply new knowledge and skills that can help them in their job and further their career. Professional development is all about building one's skill set and knowledge base for their field.

Professional development is also helpful for the employer. By having opportunities to learn, increase one's skill sets, and stay up-to-date on academic trends, employees can increase their worth, while also adding to the organization's overall value.

## **Professional Development Committee Activity**

The Professional Development Committee (PDC) assumes the role of hosting and arranging diverse programming with professional development content throughout the year. This includes arranging informational sessions where employees can share relevant courses/sessions/training that others might learn from. The PDC is intended for wider group training that is helpful beyond a particular unit.

Some examples include:

- Online sessions for training in FOLIO
- Sessions for how to conduct systematic reviews
- Customer service training
- Assessment training
- Database training

## **Committee Responsibilities**

- Monitor Amigos, ALA, ARL, NASIG, ACRL, TLA, MLA, TAMU-HROE, and other professional organizations for relevant training opportunities.

- Maintain list of relevant organizations.
- Maintain calendar for application deadlines for regularly offered opportunities.
  - Leading Self (TAMU)
  - Leading Others (TAMU)
  - TALL Texans
  - ALA Library Support Staff Certification, etc.
- Send reminders of relevant opportunities.
- Arrange training for products commonly used in the Libraries.
  - MS products
  - FOLIO
  - Adobe
  - SpringShare, etc
  - SQL

### **Funding Breakdown**

Librarians currently have an annual \$3,000 allotment for professional development and service.

Annual Professional Development Funds (242406-14300) of \$30,277 will be allotted to library professional staff.

The Professional Development Committee will recommend and host job training and professional development opportunities that are not covered by the sources above. The PDC will forward recommendations to Library Administration to cover these costs with administrative funds.

Additionally, administrative funds will also be used at the discretion of Libraries Administration to fund travel and training for individuals when such travel and training is determined to be integral to the needs of the organization and directed by Libraries Administration.

## **Appendix B - Mentoring Guidelines**

### **Committee Responsibilities**

- Ascertain the desires of the protégé and make mentoring assignments, update the official Mentor/Protégé Assignment Roster, adjust assignment loads, and track progress of assignments.
- Work with the Libraries' Business Office for purposes of ensuring that Take Your Protégé to Lunch funds are properly credited to mentors.
- Encourage the mutually beneficial partnership by encouraging educational or sharing opportunities.
- Review and maintain the Mentoring web page on the Libraries' intranet
- Hold sessions for mentors and/or protégés to develop skills and discuss best practices.
- Conduct annual mentoring assignment assessments and make necessary adjustments.
- Seek feedback on the mentoring process and communicate this information as appropriate.

### **Mentor/Protégé Assignment Process**

A new employee's supervisor will assign a peer/buddy mentor for the first six months to assist in orienting the new person

#### Assignment of Formal Mentors after orientation period

- Upon request of the protégé, the protégé will meet with the Mentoring Committee and explain what type of mentor or mentoring is desired
- The Mentoring Committee will also solicit input from the peer/buddy mentor and supervisor on what mentoring they see needed by the protégé
- The Mentoring Committee will approach potential mentors. Mentors should be at least one rank higher than the protégé.
- The Mentoring Committee will arrange initial meetings between the protégé and potential mentor(s) and upon a successful pairing will have both parties sign the Mentor/Protégé Agreement [no longer optional]
- The Mentoring Committee will conduct annual reviews of each pairing and give guidance if either or both parties are not fulfilling the agreed upon obligations
- In order to avoid conflict of interest, the supervisor will not be assigned as a protégé's mentor.
- Informal mentors may be utilized by the protégé at any time for special expertise needs.
- No mentor shall be assigned more than two protégés

### **Freedom of Choice**

- A protégé may request a change in assigned mentors at any time.
- A mentor may request reassignment from a particular protégé at any time.
- Reassignments will be done in consultation with the Mentoring Committee so that problems/issues/expectations can be addressed in future pairings.

- All library employees in good standing are considered eligible to be assigned as mentors, but no one is obligated to be a mentor.

### **Mentor Responsibilities**

- Initiate the first meeting with a new protégé.
- Offer to meet with each protégé at least monthly, in any format – formal appointment, lunch, virtual meeting, etc.
- Assist protégé in making plans and setting action steps to achieve goals.
- Be available on request of the protégé to offer guidance on areas of concern to the protégé
- Be available on request of the protégé to identify appropriate service opportunities within the library, within the larger TAMU community, and within the profession.
- Maintain awareness of current promotion and evaluation processes and expectations. Provide guidance on professional acculturation.
- Refer to the appropriate administrative resources regarding concerns with one's work assignment (HR Liaison)
- Track progress to allow for accurate and meaningful advising, encouragement, and timely suggestions to meet protégé needs.
- Notify the chair of the Mentoring Committee to request a change in assigned protégés.
- Notify the chair of the Mentoring Committee to opt out of being formally assigned as a mentor.

### **Protégé Responsibilities**

- Meet with the mentor at the agreed upon intervals in any format – formal appointment, lunch, virtual meeting, etc.
- Contact the mentor as needed to: brainstorm, review plans, seek advice on research or service venues (if relevant)
- Ask questions about concerns, organizational process and climate, professional acculturation and expectations, and be receptive to answers.
- Contact the mentor for assistance on professional assignment issues as appropriate.
- Track progress in order to be mindful of pending issues and to receive accurate and meaningful advising, encouragement, and timely suggestions from mentors.
- Notify the chair to request a change in assigned mentors.

### **Funding**

- Funds are available for each formal mentor to take each protégé to lunch twice per fiscal year. Available funds are \$20.00 per person per lunch including an appropriate tip (between 10 to 20%). See the [Take Your Protege to Lunch Guidelines](#) for additional information.

## **Mentor/Protégé Best Practices and Expectations**

- Be open to new ideas
- Communicate effectively and respectfully
- Give and receive constructive feedback
- Create and work toward a professional goal
- Plan and devise action steps to achieve goals
- Maintain professional standards
- Avoid over-commitment
- Stay positive in the face of setbacks
- Keep trust levels high through discretion and confidentiality
- Share knowledge willingly
- Contribute to a collaborative environment
- Keep an appropriate perspective
- Maintain a sense of humor
- Appreciate the time constraints of colleagues
- Honor your agreements in a timely fashion

### Protégés

In addition to the above, the following expectations/roles apply specifically to protégés:

- Cultivate multiple mentors depending on need.
- Ask for and accept help when needed.
- Show initiative and take responsibility for their learning.
- Understand that professional growth is a process that takes time.
- Initiate meetings.

### Mentors

The following expectations/roles apply specifically to mentors:

- Assist protégés in making plans and setting action steps to achieve goals
- Convey genuine interest in helping
- Perform gatekeeper function to open doors for protégés
- Question accepted practice, including your own
- Do not “pull rank”
- Initiate offers of help