

# PURCHASE ORDER

THE TEXAS A&M UNIVERSITY SYSTEM  
HEALTH SCIENCE CENTER

Order Date

12/08/2016

FILE

200 Technology Way, Suite 2079, College Station, Texas 77845-3424; Phone 979-436-9219, FAX 979-436-0074

Page 01

Include PO number on all  
Correspondence and packages

P700030

VENDOR GUARANTEES  
MERCHANDISE DELIVERED ON  
THIS ORDER WILL MEET OR  
EXCEED SPECIFICATIONS IN THE  
BID INVITATION.

INVOICE (IN DUPLICATE) TO AGENCY BELOW

TEXAS A&M HEALTH SCIENCE CTR  
FINANCE & ADMINISTRATION  
200 TECHNOLOGY WAY STE 2079  
COLLEGE STATION TX 77845-3424

SHIP TO:

TEXAS A&M HEALTH SCIENCE CTR  
FINANCE & ADMINISTRATION  
200 TECHNOLOGY WAY STE 2079  
COLLEGE STATION TX 77845-3424

R700031

VENDOR

\*\*\*\*\*7111  
TEXAS A&M UNIVERSITY  
TEXAS A&M CAMPUS COURSE  
DAVE ELMENDORF  
3250 TAMU  
COLLEGE STATION, TX 77843-3250

ALL TERMS AND  
CONDITIONS SET  
FORTH IN THE  
BID INVITATION  
BECOME A PART  
OF THIS ORDER.

ANY EXCEPTION TO PRICING OR DESCRIPTION CONTAINED HEREIN MUST BE APPROVED BY  
HUB & PROCUREMENT SERVICES PRIOR TO SHIPPING.

PLEASE NOTE: IF YOUR INVOICE IS NOT ADDRESSED AS  
INSTRUCTED PAYMENT WILL BE DELAYED.

Item	Description	Quantity	UOM	Unit Price	Ext Price
	USER REF: 120001-00000				
	REQUESTING NEW PO BAM DOC R209523 CLOSED OUT AFTER 1ST PAYMENT FOR PAYMENT & ENCUMBRANCE PURPOSES.				
1	Library Services Contract	3	EA	750,666.000	2251,998.00
				TOTAL	2251,998.00
	Purchase made by an Institution of Higher Education, Section 51.9335 Education Code.				
	CC      FY      ACCOUNT NO.      DEPT.				
	--      ----      -----      -----				
	23      2017      120001-00000-5661      4110			1201,998.00	
	23      2017      220520-00000-5661      4110			1050,000.00	
	DOCUMENT DATE: 12/08/2016				
	DEPT.CONTACT: CAROLE CADDLE PHONE NO.:				
	PCC CD: 9				
	TYPE FUND: S TYPE ORDER: HIED				

SAW

SAW

FOB: NOT SPECIFIED

The Texas A&M University System Health Science Center cannot accept collect freight shipments.

Terms:

FAILURE TO DELIVER-If the vendor fails to deliver these supplies by the promised delivery date or a reasonable time thereafter, without giving acceptable reasons for delay, or if supplies are rejected for failure to meet specifications, the State reserves the right to purchase specified supplies elsewhere, and charge the increase in price and cost of handling, if any, to the vendor. Neither substitutions nor cancellations permitted without prior approval.

IN ACCORDANCE WITH YOUR BID, SUPPLIES/EQUIPMENT MUST BE PLACED IN THE DEPARTMENT RECEIVING ROOM BY

THIS ORDER IS NOT VALID UNLESS SIGNED BY THE PURCHASING AGENT.

THE STATE OF TEXAS IS EXEMPT FROM ALL FEDERAL EXCISE TAXES

STATE AND CITY SALES TAX EXEMPTIONS CERTIFICATE: The undersigned claims an exemption from taxes under Texas Tax Code, Section 151.309(4), for purchase of tangible personal property described in this numbered order, purchased from contractor and/or shipper listed above, as this property is being secured for the exclusive use of the State of Texas. The Terms and Conditions of the State of Texas shall prevail.

PURCHASING AGENT FOR  
THE TEXAS A&M UNIVERSITY SYSTEM HEALTH SCIENCE CENTER

# PURCHASE ORDER

## THE TEXAS A&M UNIVERSITY SYSTEM HEALTH SCIENCE CENTER

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200 Technology Way, Suite 2079, College Station, Texas 77845-3424; Phone 979-436-9219, FAX 979-436-0074

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FINANCE & ADMINISTRATION  
200 TECHNOLOGY WAY STE 2079  
COLLEGE STATION TX 77845-3424

<b>VENDOR</b>
<p>*****7111 TEXAS A&amp;M UNIVERSITY TEXAS A&amp;M CAMPUS COURSE DAVE ELMENDORF 3250 TAMU COLLEGE STATION, TX 77843-3250</p>

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COLLEGE STATION TX 77845-3424

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	CC      FY      ACCOUNT NO.      DEPT.				
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	23      2017      120001-00000-5661      4110			1201,998.00	
	23      2017      220520-00000-5661      4110			1050,000.00	
	DOCUMENT DATE: 12/08/2016				
	DEPT.CONTACT: CAROLE CADDLE				
	PHONE NO.:				
	PCC CD: 9				
	TYPE FUND: S TYPE ORDER: HIED				
SAW					

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DEPARTMENT RECEIVING ROOM BY

The State of Texas is exempt from all Federal Excise Taxes

STATE AND CITY SALES TAX EXEMPTIONS CERTIFICATE: The undersigned claims an exemption from taxes under Texas Tax Code, Section 151.309(4), for purchase of tangible personal property described in this numbered order, purchased from contractor and/or shipper listed above, as this property is being secured for the exclusive use of the State of Texas. The Terms and Conditions of the State of Texas shall prevail.

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\_\_\_\_\_  
PURCHASING AGENT FOR  
THE TEXAS A&M UNIVERSITY SYSTEM HEALTH SCIENCE CENTER

## Caddle, Carole L.

---

**From:** Nace, Kristin M.  
**Sent:** Thursday, December 01, 2016 1:46 PM  
**To:** Caddle, Carole L.  
**Subject:** RE: PO32591 in BAM Library Service Contract closed.

Hi Carole,

The new requisition should be split:

\$1,201,998 on account 120001-5661 R700031  
\$1,050,000 on account 220520-5661

Thanks,  
Kristin

**From:** Caddle, Carole L.  
**Sent:** Thursday, December 01, 2016 12:42 PM  
**To:** Nace, Kristin M. <KMNace@tamhsc.edu>  
**Subject:** FW: PO32591 in BAM Library Service Contract closed.

Hi,  
I need to submit a new requisition for the 3 remaining installments of \$750,666.00 each in FAMIS, do you want me to use account # 200007.  
Thank you,  
Carole

**From:** Division of Finance and Administration [<mailto:ap-help@tamu.edu>]  
**Sent:** Thursday, December 01, 2016 12:26 PM  
**To:** Caddle, Carole L. <[Caddle@tamhsc.edu](mailto:Caddle@tamhsc.edu)>  
**Subject:** PO32591 {305507}

--reply above this line--

First of all, sorry this happened --it has been discovered that there is a glitch in the BAM system that sometimes marks invoices final pay in error. I checked with my supervisor and the entire encumbrance was released and since this is not an SRS account it is paying against, yes you can set it up in FAMIS. Thanks!

Sandy deGeurin I Financial Specialist II  
FMO Accounts Payable I Texas A&M University  
6000 TAMU I College Station, TX 77843-6000

ph. 979-458-4326 I fax 979-862-7105 I [sdegeurin@tamu.edu](mailto:sdegeurin@tamu.edu)

It's Time for Texas A&M

NOTE: When replying to this email please leave the subject-line intact.

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Ticket Details:  
Requester: Carole L. Caddle  
Subject: PO32591

\*\*\*\*\* Prior Activity \*\*\*\*\*

---

From: **Carole L. Caddle**  
12/1/2016 11:01:37 AM

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**Not sure how that happened. Have the remaining funds been released back to our account? I will create the requisition in FAMIS not BAM. Thanks**

---

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From: **Sandy deGeurin**  
12/1/2016 10:21:07 AM

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It appears that the invoice we received for 750,666.00 was marked final pay in error when the invoice was set up. Therefore it converted the PO to 750,666.00 and closed it. This was an error, to correct it a new open market for the remaining items needs to be done ( a new requisition) and please add a note do not mark invoices final pay. If you let me know the R number when it is set up I can take a look at it. thanks

Sandy deGeurin I Financial Specialist II  
FMO Accounts Payable I Texas A&M University  
6000 TAMU I College Station, TX 77843-6000

ph. 979-458-4326 I fax 979-862-7105 I [sdegeurin@tamu.edu](mailto:sdegeurin@tamu.edu)

It's Time for Texas A&M

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**Good Morning,**  
**I need to pay the 2nd installment for our Library Service contract, the BAM PO32591 has been closed after one installment, no receipt can be paid against it. The PO was setup for four equal payments, please advise.**  
**Thank you,**  
**Carole**

**Carole Caddle**  
**Property and Business Associate**  
**TAM HSC Finance & Administration**  
**200 Technology Way Suite 2079**  
**College Station, TX. 77845**  
**Ph: 979-436-9231**

## Library MOU - 2016-2017

Total Agreement	\$2,947,057.00
One-time Costs	\$55,607.00
	<b>\$3,002,664.00</b>

Installment #	Installment Due Date	Installment Amount	Date pymt sent:
Installment 1 (25%)	September 30, 2016	\$750,666.00	9/15/2016
Installment 2 (25%)	December 31, 2016	\$750,666.00	
Installment 3 (25%)	March 31, 2017	\$750,666.00	
Installment 4 (25%)	June 30, 2017	\$750,666.00	

**\$3,002,664.00**

Account 220520-5661      Until funds exhausted.  
Account 120001-5661      Use after 220520.

Email Willie or Carole requesting payment amount and account, including copy of contract as PDF. Note payment installment number and due date in email. Initiate payment request (14) days prior to due date.

Check 220520 before emailing payment request.

**TEXAS A&M HEALTH SCIENCE CENTER AND MEDICAL SCIENCES LIBRARY  
MEMORANDUM OF UNDERSTANDING**

This memorandum of understanding and agreement is entered into by and between the following components of Texas A&M University (TAMU): the Texas A&M Health Science Center (HSC) and the Medical Sciences Library (MSL)

**II. STATEMENT OF SERVICES TO BE PERFORMED:**

**MSL** agrees to acquire or provide access to print and electronic library resources in disciplines important to the **HSC** based instructional, research, and service activities in sites identified by the **HSC**. **MSL** will: provide instruction in medical informatics to professional and graduate students so that these students develop skills in identifying, evaluating, organizing, and using a wide range of information sources; provide a variety of information services and training programs to meet the needs faculty, staff and students of the **HSC**; and provide all **HSC** faculty, staff and students access to the **TAMU** libraries with similar library services and privileges as are available to College Station-based **TAMU** faculty, staff and students. **MSL** will also manage library spaces and onsite collections on HSC campuses as needed and requested.

**III. BASIS FOR CALCULATING REIMBURSABLE COSTS:**

Payment under this agreement is based upon a standard accounting Cost for Services approach which provides detailed cost figures for both direct and indirect costs associated with the delivery of the above detailed information resources and services. While the cost for services data is focused on the Medical Sciences Library as the anchor library for delivering the resources and services provided under this agreement, relevant overhead costs from the University Libraries, as the parent organization, are also included. Cost sharing between the **HSC** and other **TAMU** user populations is based on relative proportions of student semester credit hours within the primary users served by the Medical Sciences Library and Texas A&M University as a whole. Expenses for library services and resources come directly from the Medical Sciences Library budget, and as needed from the Evans Library budget. Student semester credit hour data are taken from the **TAMU** Data and Research Services (DARS) and the **HSC** Office of Institutional Effectiveness. The cost sharing methodology is detailed in Attachment 1.

**IV. AGREEMENT AMOUNT:**

The total Agreement Amount for the period beginning September 1, 2016 and ending August 31, 2017 is \$2,947,057 plus one-time costs of \$55,607 for a total amount due of \$3,002,664. This amount does not include start-up costs listed in paragraph VI below. Since the basis for cost allocation is student semester credit hours, under this agreement the **HSC** may offer access to library resources and services to any affiliated users who play a role in support of the teaching, research and service missions of the **HSC** without additional costs. The agreement amount will be revised annually based on the full complement of student semester credit hours as reported by both **HSC** and **TAMU** through the offices named above for the preceding fall semester.

**V. PAYMENT FOR SERVICES:**

During each annual term of this agreement, **HSC** will remit the respective Agreement Amount in four equal quarterly payments to **TAMU** for services rendered under this Agreement no later than each September 30, December 31, March 31 and June 30. **HSC** shall pay for services received from appropriation items or accounts of **HSC** from which like expenditures would normally be paid, based upon special vouchers drawn by **HSC** or through electronic transactions, payable to **TAMU**. Payments received by **TAMU** shall be credited to its current appropriation items(s) or account(s) from which the expenditures of that character were originally made.

## VI. START-UP COSTS:

There may be situations triggered primarily by an **HSC** decision to expand its programs, when a significant increase in library resources is required that cannot be absorbed by the existing library budget. Cost sharing for these "start-up costs" shall be determined on an individual case by case basis. The exact cost sharing ratio, which will be consistent with the cost sharing methodology described in Attachment 1, will depend on the nature of the resources needed to support the program and their potential value to other **TAMU** users. **MSL** library staff, in consultation with appropriate **HSC** unit based individuals, will develop: an itemized cost estimate of requested materials for approval by the **HSC**; an appropriate cost sharing methodology; and a schedule for billing and payment for these costs. Following the appropriate **HSC** approval, **MSL** library staff will begin the process of acquiring and billing for these resources. In subsequent years, costs for renewing these information resources will be included in the overall cost for services statement of the library and allocated between **TAMU** and **HSC** in accordance with the cost sharing methodology described in Attachment 1.

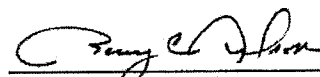
## VII. TERM OF AGREEMENT:


This MOU shall be for a term of one fiscal year, September 1, 2016 to August 31, 2017. The parties agree that the cost allocation methodology detailed in Attachment 1 will be reviewed annually to ensure it represents the best and most fair allocation of costs. The **HSC** and **MSL** will work closely together to mediate costs escalation. Updated student semester credit hour data from the previous fall will be provided to **TAMU** by the **HSC** in April of each fiscal year and **TAMU** will advise the **HSC** of updated costs coinciding with the annual budget process. Such revised student semester credit hour and library budget data will be used to determine the "Agreement Amount" for the subsequent year by May 31. In the event that the "Agreement Amount" is expected to increase by more than 3% from one year to the next, **MSL** will inform **HSC** of the reasons for the increase and work with **HSC** to reduce costs in a mutually satisfactory manner.

The undersigned parties bind themselves to the faithful performance of this agreement.

Texas A&M Health Science Center

Texas A&M Medical Sciences Library

 6/30/2016  
Barry C. Nelson, Ph.D.  
Vice President for Finance and Administration

 7/7/2016  
Esther Carrigan, MLS, AHIP  
Associate Dean and Director, MSL

**HSC-MSL Library Services Agreement  
Highlights of FY 2017 Differences**

Infrastructure Costs

- Removed from agreement since TAMU no longer collects from MSL agreement

Evans Materials

- Removed from agreement cost calculation since it is no longer possible to reasonably estimate this amount

SCH Calculations and Percentages

- Updated SCH Calculations and Percentages with Fall 2015 data

MSL Personnel

- Consistent with FY 2016 approach
- Updated for staffing changes
- Includes anticipated FY 2017 merit (4%) and one faculty promotion

MSL Materials

- Consistent with FY 2016 approach
- Includes a few multi-year licensing agreements to save total licensing costs for a resource
- Separate listing provided for new HSC resources

MSL Renovations

- 1<sup>st</sup> floor carpeting renovation
- HSC proportional share based on College Station-based students

Evans Personnel

- Consistent with FY 2016 approach
- Updated for staffing changes

Evans Operating

- Consistent with FY 2016 approach

FY 2017 increase of \$219,033 or 8 %

Additional one-time costs this year not included in agreement but due to MSL: \$55,607

- HSC Public Computers – purchased by MSL and transferred to HSC inventory; 4 year replacement schedule; should be transferred to HSC OIT budget process
- HSC Copier Overages needs solution by July 2016



**HSC-MSL Library Services Agreement  
Cost Increase Details FY 2017**

**MSL Budget for FY2016**

- 62% Collections
- 32% Salaries and Wages
- 6% Operations

**Collections continue to represent the largest portion of cost increase for MSL in general, and specifically for the HSC-MSL Library Services Agreement**

**Collection expenses have increased about 12% annually over the last 3 years**

**FY2015 Collection Expenditures (\$2,955,177)  
(basis for FY17 agreement collection costs)**

**Format Breakdown**

88.5% Electronic

11.5% Print

**By format breakdowns, HSC focused expenditures account for from nearly 75% to over 98% of MSL collection expenditures**

- HSC resources account for 95.6% of e-journal expenditures
- HSC resources account for 98.2% of e-tools expenditures
- HSC resources account for 73.4% of e-database expenditures
- HSC resources account for 88% of e-book expenditures
- HSC resources account for 23% of print journal expenditures (primarily these are veterinary)
- HSC resources account for 55% print book expenditures

**By broad client group categories, HSC focused expenditures account for over 89% of MSL collection expenditures**

- Biomedical Research resources account for 48.5% of collection expenditures
- HSC Clinical/Educational resources account for 40.9% of collection expenditures
- Veterinary resources account for 10.5% of collection expenditures
- Agriculture resources account for less than 1% of collection expenditures (chiefly purchased by Evans library)

**Methodology for Library Services Cost Determination FY17**  
**Comprehensive Health Science Center Coverage and Onsite Library**  
**Staffing for Bryan, Round Rock, Kingsville and Temple Campuses**

Expenditure Category	FY17 Estimated	Evans Library \$		MSL \$		Total \$
		Indirect	Direct	Indirect	Direct	
<b>Level 1- Evans Library Budget:</b>						
Evans Personnel (pg 3)	\$ 11,820,461	\$ 1,814,780	\$ 9,556,771	\$ 448,910		\$ 11,820,461
Evans Materials (deleted)						
Evans Materials Inflation (deleted)						
Evans Operating (pg 4)	4,786,999	188,192	4,592,255	46,552		4,786,999
Evans Infrastructure (deleted)						
<b>Total</b>	<b>\$ 16,607,460</b>	<b>\$ 2,002,972</b>	<b>\$ 14,108,016</b>	<b>\$ 495,462</b>	<b>\$ -</b>	<b>\$ 16,607,460</b>
<b>Level 2- Medical Sciences Library Budget:</b>						
Indirect from Level 1 Allocation	495,462			\$ 495,462		\$ 495,462
Direct from Level 1 Allocation						
MSL Personnel (pg 5)	\$ 1,943,631	-	-	250,178	1,664,453	1,943,631
MSL Materials (pg 6)	3,824,739			-	3,824,739	3,824,739
MSL Materials Inflation	382,474			-	382,474	382,474
MSL Direct HSC Operating (pg 7)	13,388			-	13,388	13,388
MSL HSC Copier Rental Monthly (pg 7)	13,038			-	13,038	13,038
MSL Other Operating	394,403			-	394,403	394,403
MSL Renovations (pg 7)				-	298,275	298,275
MSL Infrastructure (deleted)						
<b>Total</b>	<b>\$ 7,607,134</b>			<b>\$ 754,639</b>	<b>\$ 6,610,770</b>	<b>\$ 7,365,409</b>

Note: Started with FY15 budget. Inflation is based upon historical 6% at Evans and 10% at MSL.

**Level 3- Medical Sciences Library allocation of costs to user groups:**

Budget Categories	TAMU	HSC	Total
<b>Personnel</b>			
Direct Personnel	680,288	147,772	828,059
HSC Direct Support		470,373	470,373
TAMU Direct Support	386,020		386,020
<b>MSL Materials</b>			
Direct Materials - Evans (incl inflation)	-	-	-
Direct Materials - MSL	1,522,824	330,767	1,853,591
Direct Materials Inflation - MSL	152,782	33,079	185,861
HSC Materials		1,563,814	1,563,814
HSC Materials Inflation		156,381	156,381
TAMU Materials only	407,314		407,314
TAMU Materials Inflation	40,731		40,731
<b>MSL Operating</b>			
Direct HSC Operating	-	13,388	13,388
HSC Copier Rental Monthly	-	13,038	13,038
Other Operating	324,020	70,383	394,403
MSL Renovations	284,903	13,372	298,275
<b>Subtotal</b>	<b>3,798,382</b>	<b>2,812,388</b>	<b>6,610,770</b>
Application of Infrastructure Overhead	-	-	-
Application of All Other Overhead	619,970	134,669	754,639
<b>Total</b>	<b>\$ 4,418,352</b>	<b>\$ 2,947,057</b>	<b>\$ 7,365,409</b>

\*Includes four FTE for on-site staffing for Bryan, Round Rock, Kingsville and Temple campuses

\*MSL Renovations reflects percentage of HSC students on TAMU campus rather than Bryan campus

Prepared by: Yano Parulan 4/21/2016

Agreement Amounts	Total
FY17 Total Agreement Amount	\$ 2,947,057
FY16 Total Agreement Amount	\$ 2,728,024
FY17 Increase	\$ 219,033
FY17 Total Percentage Increase *	8.0%

One-Time Expenses (not included in FY17 Agreement)	
HSC Copier Overages (need solution)	\$ 24,016
HSC Public Computers (every 4 years)	\$ 31,591
<b>Total FY16 One-Time Expenses</b>	<b>\$ 55,607</b>

FY17 Total Due to MSL	
FY17 Total Agreement Amount	\$ 2,947,057
FY16 One-Time Expenses	\$ 55,607
<b>Total FY17 Due to MSL</b>	<b>\$ 3,002,664</b>

## SCH Calculations and Percentages

### Semester Credit Hours

User Groups	SCH
MSL TAMU	123,381
Discounted HSC	26,801
CS Based HSC	12,791
CS Based Total MSL	136,172
Total MSL CS Based G&P Students	34,953
Total MSL	150,182
Total TAMU aka Evans Total	757,312

MSL SCH Calculations - from DARS  
TAMU SCH Summaries by College  
Fall 2015 Data

Category	SCH
Vet Med	8,025
HLKN	42,440
COALS	59,401
Vet Professional/ DVM	13,515
Total MSL Part 02	123,381

COALS (Ag & Life Sci) Fall 2015	Total	MSL	Evans
AGEC	8,668		8,668
ALEC	7,800		7,800
ANSC	11,462	11,462	
BAEN	2,653		2,653
RCRP	7,948	7,948	
CLAG	-	-	
ENTO	6,067	6,067	
ESSM	4,566	2,283	2,283
HRSC	3,969	3,969	
HFSC	8,266	8,266	
PLPM	2,984	2,984	
POSC	2,317	2,317	
RPTS	6,232	6,232	
SCSC	4,161	4,161	
WFSC	3,712	3,712	
Total COALS	80,805	59,401	21,404

CS Based Graduate & Professional Students	SCH
Veterinary Professional/DVM	13,515
HLKN	2,563
COALS	6,084
CS Based HSC	12,791
Total MSL Grad & Prof Students	34,953

### Percentages for Application to Expenses

Categories	Percent
Total MSL / Total Evans	19.8%
CS Based Total MSL / Total Evans	18.0%
MSL TAMU / Total Evans	16.3%
CS Based HSC / CS Based Total MSL	9.4%
HSC / Total MSL	17.8%
CS Based HSC / Total Grad & Prof	36.6%
MSL TAMU / Total MSL	82.2%

HSC Calculations from Amanda Allen  
Fall 2015 Data Summary

Category	SCH	% of HSC	Discounted SCH	% of HSC
MD - CS	4,572	14.3%	4,572	17.1%
MD - T/RR	3,624	11.4%	3,624	13.5%
MD - Dallas	1,116	3.5%	1,116	4.2%
MD - Houston	312	1.0%	312	1.2%
DDS 1-3	3,780	11.9%	945	3.5%
DDS 4	1,248	3.9%	312	1.2%
Hygiene	895	2.8%	224	0.8%
Dental Grad	182	0.6%	46	0.2%
SGS-CS	460	1.4%	460	1.7%
SGS-A, D, H, K, T, RR	493	1.5%	247	0.9%
Clinical Graduate Students	516	1.6%	258	1.0%
Nursing - Undergrad	2,990	9.4%	2,990	11.2%
Nursing - Grad	282	0.9%	282	1.1%
Pharmacy - Kingsville	6,546	20.5%	6,546	24.4%
Pharmacy - CS	1,137	3.6%	1,137	4.2%
SPH - CS	3,350	10.5%	3,350	12.5%
SPH - A, McA	381	1.2%	381	1.4%
Total HSC	31,884	100%	26,801	100%

Note: In order to translate headcount into SCH for MD and DDS students, a multiplier of 12 was used. For Clinical Graduate Students, a multiplier of 6 was used.

The user groups specified below have another library as their primary source for resources and services. Their SCH has been discounted at 50%, except for BCD students who are discounted at 75%.

Discounted User Populations	SCH	% of HSC	Discounted SCH
DDS 1-3	3,780	11.9%	945
DDS 4	1,248	3.9%	312
Hygiene	895	2.8%	224
Dental Grad	182	0.6%	46
SGS-A, D, H, K, T, RR	493	1.5%	247
Clinical Graduate Students	516	1.6%	258
Total HSC user population	7,114	22%	2,031

Evans Personnel (Overhead)

PIN	Budgeted Individuals	Position	FY16 Salary
<b>Dean's Office</b>			
M22961	David Carlson	Dean	
M22539	Crystal Vinal	Assistant to Dean	
<b>Administrative Services / Other</b>			
M24611	Adelle Hedleson	Mgr Library Dev	
M03461	Michael Maciel	Sr Data Analyst	
<b>Business Services</b>			
M10849	Anna Janne	Sr Acad Bus Admin II	
M25312	Mo Tan Cheng	Bus Admin II	
M33152	Yanli Parulan	Bus Coordinator I	
M03478	Glenda Speelman	Bus Assoc III	
M03444	Terica Reynolds	Bus Assoc III	
M31979	Lisa Cauvel	Bus Assoc II	
M03449	Elizabeth Arthur	Bus Assoc III	
<b>Employee Resources</b>			
M10003	Jan Pfannstiel	Asst Dean for Finance, HR, Diversity	
M34831	Kim Wolfe	Sr Human Res Rep	
M30105	Ashley Kelly	Admin Assist	
<b>Marketing and Communication</b>			
M37912	Patrick Zinn	Marketing Manager	
M10850	Rachel Duffus	Graphics Designer	
M24671	Brenda White	Admin Assist	
M33934	Becker, Chad	Graphics Designer	
M35585	Samantha Geyer	Comm Specialist	
<b>Digital Initiatives</b>			
M35389	Mike Bolton	Assistant Dean	
M28293	Doug Hahn	Sr IT Manager	
M15202	Bill Chollett	Sr IT Manager	
M39183	Bennett Ponsford	Dig Svcs Librarian	
M03466	Stephen Parnpeli	Lead Systems Admin	
M15559	Galliano Macaille	Sr. System Admin	
M30627	John Cooper	Lead SW App Dev	
M31279	James Creel	Sr Lead SW App Dev	
M33440	Jeremy Huff	Sr SW App Dev	
M25214	William Martin	OB Admin	
M34291	Rincy Mathew	Software App Developer	
M38871	Jason Savell	Software App Developer	
<b>Facilities</b>			
M25959	Jim Smith	Facilities Manager	
M35594	Kerry Pfannstiel	Office Associate	
M27329	Stephanie Walker	Facilities Specialist	
M26284	Keith Henderson	Facilities Specialist	
		Benefits	
		Total	2,154,643

Student Worker Budgets	Total
SW - Admin Suite	\$ 29,047
SW - OCS	\$ 80,000
	\$ 109,047

Total Evans Personnel	Total
OH Personnel	\$ 2,263,690
Evans personnel - Direct Cost	\$ 9,356,771
Evans Total Personnel Cost	\$ 11,820,461

## Evans Operating

Digital Initiaves	Amount
Lib Ops	3,874
Lib DI Ops	-
<b>Subtotal DI Indirect</b>	<b>3,874</b>

\*Covered by MSL-DI agreement

Other Operating	Amount
Faculty Research and Mentoring	27,470
Admin Supplies	8,600
Bus Ops Supplies	1,750
Records Mgmt Shredding	14,000
UPD Security	179,050
<b>Subtotal Other Operating</b>	<b>230,870</b>

<b>Total Evans Operating Budget Indirect</b>	<b>234,744</b>
Evans Portion	188,192
MSL Portion	46,552

## MSL Personnel

NAME	TITLE	FY16 Annual	Indirect	Direct - all	Direct - TAMU	Direct - HSC
Bankston, Sarah	Instructional Assistant Professor					
Burford, Nancy	Associate Professor					
Carrigan, Esther	Professor					
Chofo, Florencia	(Evans - Voyager support)					
Foster, Christine	Associate Professor					
Foster, Margaret	Associate Professor					
Green, Sheila	Lecturer					
Halling, Derek	Associate Professor					
Highsmith, Anne	(Evans - Voyager support)					
Meador, Arwen	Instructional Assistant Professor					
Moberly, Heather	Professor					
Pepper, Cathy	Assistant Professor					
Sewell, Robin	Associate Professor					
Shurtz, Suzanne	Associate Professor					
Simonsen, Jennifer	Assistant Professor					
Thornick, Joel	Associate Professor					
Ugar, Ana	Associate Professor					
Wu, Lin	Instructional Assistant Professor					
Bingham, Brian	Library Associate I					
Corte, Therese	Library Associate I					
Crews, Molly	Library Associate I					
Daniel, Rozita Rose	Library Manager					
Eames, David	Library Specialist III					
Flanagan, Pamela	Library Associate I					
Fuhrmann, Rhonda	Library Associate I					
Kuhl, Erin	Library Associate I					
Michaelson, Susan	Library Associate I					
Peters, Teresa	Library Associate II					
Raney, Lyndsey	Library Associate I					
Rey, Laura	Library Associate I					
Samford, Sandy	Administrative Coordinator					
Smith, Carol	Library Specialist III					
Sowders, Julia	Library Associate I					
Tajalli Pour, Paria	Library Specialist II					
	Total Base Salaries:	\$ 1,774,979	\$ 234,873	\$ 729,120	\$ 371,174	\$ 439,812

Personnel Cost	Indirect	Direct - all	Direct - TAMU	Direct - HSC	Total
FY16 Base Salaries	\$ 234,873	\$ 729,120	\$ 371,174	\$ 439,812	\$ 1,774,979
FY17 Merit pool	\$ 9,305	\$ 29,165	\$ 14,847	\$ 17,592	\$ 70,909
FY17 Salary Adjustments	\$ -	\$ 774	\$ -	\$ 6,969	\$ 7,743
Wages	\$ 15,000	\$ 69,000	\$ -	\$ 6,000	\$ 90,000
ACAP & Fringe	\$ -	\$ -	\$ -	\$ -	\$ -
Total FY17 Personnel Cost:	\$ 259,178	\$ 828,059	\$ 386,020	\$ 470,373	\$ 1,943,631

Note: Included planned 4% merit pool

## MSL Materials

Categories	FY15 Actual	FY16 Budget
Total Resources	2,955,177	3,824,739
HSC Only	1,208,278	1,563,814
Vet	311,832	403,589
Ag	2,878	3,725
Biomed - All Users	1,432,189	1,853,611

Used FY15 Actual Expenditures coded by subject to apportion into FY16 budget categories.

Materials divided by HEGIS as follows:

HSC	Expenses
Clinical Medicine	\$732,327
College of Pharmacy	\$153,252
Nursing	\$10,849
Public Health	\$42,460
Medical Importance	\$268,544
Reference Medical	\$847
Total:	\$1,208,278

Veterinary	Expenses
Reference Veterinary	\$287
Veterinary Importance	\$223,649
Veterinary Medicine	\$87,896
Total:	\$311,832

Ag	Expenses
Agriculture	\$2,878
Total:	\$2,878

Biomedical	Expenses
Biomedical Research	\$1,430,709
Reference General	\$0
Miscellaneous	\$45
Library Science	\$1,435
Total:	\$1,432,189

# MSL HSC Related Operating Expenses

FY16 HSC Operating Expenses	YTD (3/03) Exp.
HPEB Supplies	\$ 1,201
Round Rock Supplies	\$ 296
Temple Supplies	\$ 452
Kingsville Supplies	\$ 59
HSC Travel	\$ 7,019
Other	\$ 4,362
<b>Total</b>	<b>\$ 13,388</b>

\*TexShare for Baylor CoD

<b>Total HSC Related Op. Exp:</b>	<b>\$ 13,388</b>
<b>Total HSC Op. Special Exp:</b>	<b>\$ 68,645</b>
<b>Total HSC Related Renov. Exp:</b>	<b>\$ 13,372</b>

FY16 HSC Operating - Special	YTD Exp.
HSC Copier Rental Monthly	\$ 13,038
HSC Copier Overages	\$ 24,016
HSC Public Computers	\$ 31,591
<b>Total</b>	<b>\$ 68,645</b>

\*includes monthly through Aug 2016

\*extra color copies actual & estimates-need solution

\*one-time cost every 4 years

FY15/16 Renovation Projects	Total Cost	HSC Portion
1st Floor Carpeting Renovation	\$ 298,275	\$ 13,372



**Methodology for Library Services Cost Determination FY17**  
**Comprehensive Health Science Center Coverage and Onsite Library**  
**Staffing for Bryan, Round Rock, Kingsville and Temple Campuses**

Expenditure Category	FY16 Estimated	Evans Library \$		MSL \$		Total \$	FY16 Total \$	% Change
		Indirect	Direct	Indirect	Direct			
<b>Level 1 - Evans Library Budget:</b>								
Evans Personnel (pg 5)	\$ 11,820,461	\$ 1,814,780	\$ 9,555,771	\$ 449,010		\$ 11,820,461	11,553,171	2%
Evans Materials (deleted)							15,783,420	-100%
Evans Materials Inflation (deleted)							793,600	-100%
Evans Operating (pg 4)	4,786,599	148,192	4,582,255	46,552		4,786,599	4,700,343	2%
Evans Infrastructure (deleted)							3,420,250	-100%
<b>Total</b>	<b>\$ 16,607,160</b>	<b>\$ 2,002,972</b>	<b>\$ 14,109,026</b>	<b>\$ 495,462</b>	<b>\$ -</b>	<b>\$ 16,607,160</b>	<b>36,250,984</b>	<b>-54%</b>
<b>Level 2 - Medical Sciences Library Budget:</b>								
Indirect from Level 1 Allocation	495,462			\$ 495,462		\$ 495,462	1,071,569	-54%
Direct from Level 1 Allocation							62,295	-100%
MSL Personnel (pg 5)	\$ 1,943,631	-	-	259,176	1,684,453	1,943,631	1,871,167	4%
MSL Materials (pg 6)	3,824,739			-	3,824,739	3,824,739	3,431,350	11%
MSL Materials Inflation	382,474			-	382,474	382,474	343,135	11%
MSL Direct HSC Operating (pg 7)	13,388			-	13,388	13,388	30,292	-13%
MSL HSC Copier Rental Monthly (pg 7)	13,038			-	13,038	13,038		
MSL Other Operating	394,403			-	394,403	394,403	426,171	-7%
MSL Renovations (pg 7)				-	298,275	298,275	929,761	-68%
MSL Infrastructure (deleted)							401,804	-100%
<b>Total</b>	<b>\$ 7,067,134</b>			<b>\$ 754,639</b>	<b>\$ 6,610,770</b>	<b>\$ 7,365,409</b>	<b>8,567,645</b>	<b>-14%</b>

Note: Started with FY15 budget. Inflation is based upon historical 6% at Evans and 10% at MSL.

**Level 3 - Medical Sciences Library allocation of costs to user groups:**

Budget Categories	TAMU	HSC	Total	FY16 HSC	% Change
<b>Personnel</b>					
Direct Personnel	680,288	147,772	828,059	166,422	-11%
HSC Direct Support		470,373	470,373	486,364	-3%
TAMU Direct Support	386,020		386,020		
<b>MSL Materials</b>					
Direct Materials - Evans (incl inflation)	-	-	-	11,358	-100%
Direct Materials - TAMU	1,522,824	330,787	1,853,611	341,300	-4%
Direct Materials Inflation - MSL	152,382	33,079	185,461	34,430	-4%
HSC Materials		1,563,814	1,563,814	1,191,016	31%
HSC Materials Inflation		156,381	156,381	119,105	31%
TAMU Materials only	407,314		407,314		
TAMU Materials Inflation	40,731		40,731		
<b>MSL Operating</b>					
Direct HSC Operating	-	13,388	13,388		
HSC Copier Rental Monthly	-	13,038	13,038	30,292	-13%
Other Operating	324,020	70,383	394,403	77,768	-5%
MSL Renovations	284,903	13,372	298,275	31,236	-97%
<b>Subtotal</b>	<b>3,758,352</b>	<b>2,812,388</b>	<b>6,610,770</b>	<b>2,492,263</b>	<b>13%</b>
Application of Infrastructure Overhead	-	-	-	92,850	-100%
Application of All Other Overhead	619,970	134,669	754,639	143,404	-6%
<b>Total</b>	<b>\$ 4,418,352</b>	<b>\$ 2,947,057</b>	<b>\$ 7,365,409</b>	<b>2,728,024</b>	<b>8%</b>

\*Includes four FTE for onsite staffing for Bryan, Round Rock, Kingsville and Temple campuses;  
 \*MSL Renovations reflects percentage of HSC students on TAMU campus rather than Bryan campus

Agreement Amounts	Total
FY17 Total Agreement Amount	\$ 2,947,057
FY16 Total Agreement Amount	\$ 2,728,024
FY17 Increase	\$ 219,033
FY17 Total Percentage Increase *	8.0%

One-Time Expenses (not included in FY17)	
HSC Copier Overages (need solution)	\$ 24,016
HSC Public Computers (every 4 years)	\$ 31,591
Total FY16 One-Time Expenses	\$ 55,607

FY17 Total Due to MSL	
FY17 Total Agreement Amount	\$ 2,947,057
FY16 One-Time Expenses	\$ 55,607
Total FY17 Due to MSL	\$ 3,002,664