

# DAL LIBRARIES BUDGET OVERVIEW 2012-13

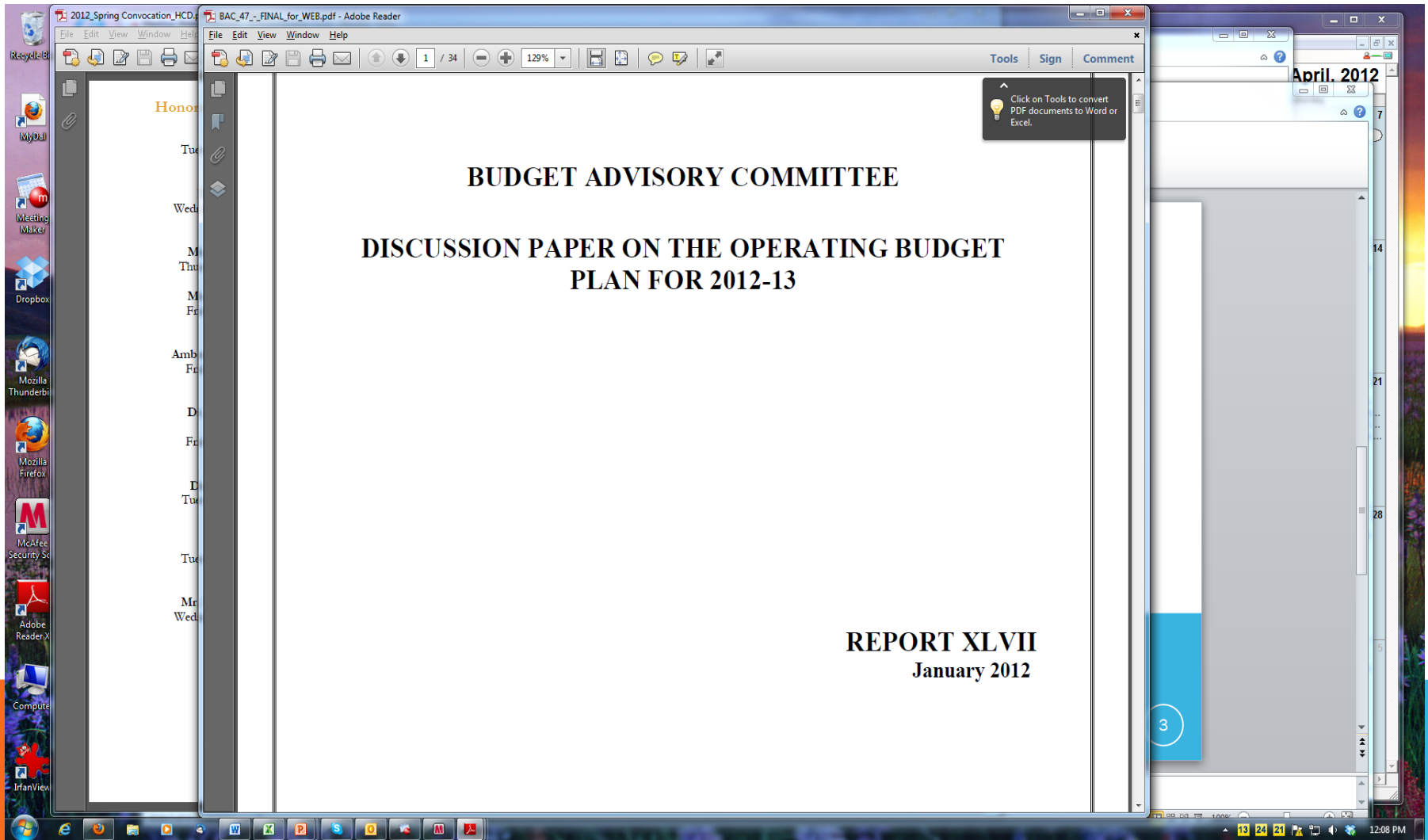
PRESENTATION TO LIBRARY COUNCIL  
APRIL 17, 2012

DONNA BOURNE-TYSON, UNIVERSITY LIBRARIAN

# OVERVIEW

- Budget process at Dal
- How the funds are allocated
- Reduction for 2012-13
- Changes to accounts and practices
- Questions & suggestions

# BUDGET PROCESS AT DAL



# BUDGET PROCESS AT DAL


Budget Allocation Letter Ian Nason April 2012.pdf - Adobe Reader

File Edit View Window Help

1 / 8 195%

Tools Sign Comment

Click on Tools to convert PDF documents to Word or Excel.



**DALHOUSIE**  
**UNIVERSITY**  
*Inspiring Minds*

**TO:** Donna Bourne-Iyson, University Librarian, Killam Library

**FROM:** Ian Nason, Assistant Vice-President, Financial Services

**DATE:** April 11, 2012

**RE:** 2012-13 Budget Allocation

---

The Budget Advisory Committee's forty-eighth report (BAC XLVIII) has recently been released. The budget allocation calculation shown on the attached schedule has been prepared based upon the recommendations found in the BAC XLVIII report with a budget reduction of 2.2%.

To the extent that your unit has made a submission for a Strategic Initiatives allocation in 2012-13, once final decisions are made this will be communicated and are therefore not included in the attached budget allocation.

The annual budget allocation shows the total resources available as supported by operating and endowment funding. The 2012-13 total budget allocation for the University Libraries is \$13,002,313 (\$12,804,925 - Operating and \$197,388 - Endowment), and the calculation is attached for your information.

15 23 28 1:09 PM

# BUDGET PROCESS AT DAL

Budget Allocation Letter Jan Nason April 2012.pdf - Adobe Reader

File Edit View Window Help

Tools Sign Comment

Click on Tools to convert PDF documents to Word or Excel.

	Funded By		
	Operating Budget	Endowment Budget (2)	Total
2011-2012 Budget:	12,800,561 (1)	188,428	12,988,989
One-Time Operating Budget Adjustments in 2011-2012:			
NSGEU Retroactive Salary Increase 2010-11	(23,727)		(23,727)
2012-2013 Beginning Base Budget Allocation:	12,776,834	188,428	12,965,262
Base Adjustments:			
Endowment Adjustment		8,960	8,960
BAC XLVIII Recommended Budget Adjustment: 2.2%	(156,933)		(156,933)
Salary Annualization	18,281		18,281
Non Salary Increase	14,571		14,571
Budget transfer from IIS to the Library for Help Desk	152,172		152,172
2012-2013 Budget Allocation:	<u>12,804,925</u>	<u>197,388</u>	<u>13,002,313</u>
<b>The minimum amount that can be budgetted for Library Acquisitions in 2012-13 is:</b>		<b>5,643,506</b>	

13 26 23 1:15 PM

# BUDGET PROCESS AT DAL

Not included in Dal Libraries budget are special one-time funds:

- Strategic Initiatives funding
- Non-Space Equipment Fund (\$21,000 per year, to split among Killam, Kellogg , Sexton – Dunn receives theirs through the Dean of Law)
- Renovations covered by Alterations & Renovations (A & R) Fund in Facilities Management
- Some furniture purchases expended through Facilities

# HOW THE FUNDS ARE ALLOCATED

- Draft budget prepared by UL and Administrative Officer, based on last year's budget, actual expenditures, and projected cut for 2012-13
- Budget was reviewed by Senior Management Team – current practices reviewed and potential changes suggested
- Local input from each library; revisions made accordingly
- Draft budget adjusted to meet reduction target in April memo

# HOW THE FUNDS ARE ALLOCATED

- During the next year, the University Librarian, Head of Collections and Heads of Libraries will undertake a review of the allocation formula
- Considerations may include average cost of materials per discipline, number of faculty, number of students, research activity of faculty, curriculum requirements, accreditation requirements
- Questions to answer include whether the current division of resources is equitable – are all Dal students and faculty in all disciplines receiving comparable access and services?



# REDUCTION FOR 2012-13

BAC Recommendation 2.2% (excluding acquisitions) = \$156,933.00



# REDUCTION FOR 2012-13

Reduction for 2012-13 will be achieved by:

- Small reductions to operating expenses
- Consolidated approach to IT resource allocation & IT services
- Re-thinking use of endowments
- Expanding definition of acquisitions to include collection management expenses

# CHANGES TO ACCOUNTS AND PRACTICES

Prior to this year:

- Kellogg
- Killam
- Sexton
- Dunn (acquisitions funding only)
- GIS
- Archives
- IT (combined with Tech services, Circulation)
- Acquisitions

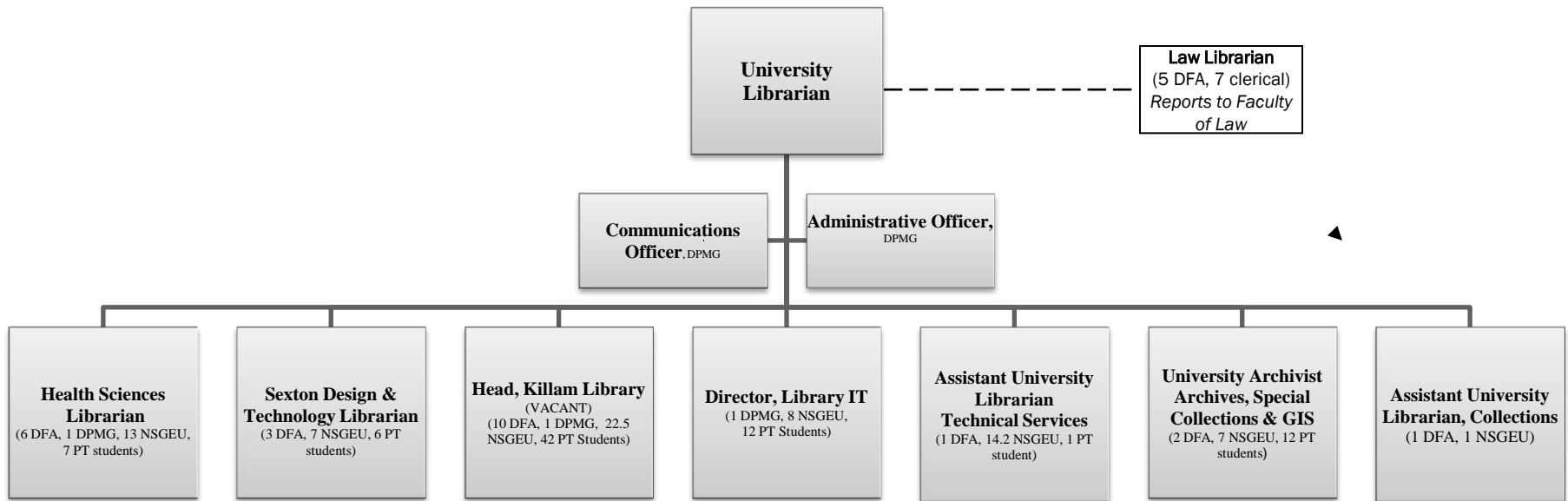
# CHANGES TO ACCOUNTS AND PRACTICES

Changes for 2012-13 to reflect 'confederation of libraries' model:

- Kellogg
- Killam (including Circulation, excluding system-wide costs)
- Sexton
- Dunn (acquisitions funding only)
- New Office of the University Librarian (system-wide admin costs)
- Each functional head (Archives, IT, Technical Services, Collections) has a separate line for system-wide services

# CHANGES TO ACCOUNTS AND PRACTICES

## DALHOUSIE LIBRARIES ORGANIZATION CHART MARCH 2012



# CHANGES TO ACCOUNTS AND PRACTICES

Changes for University Librarian's Office (new line)

- System-wide expenses such as Admin Office
- Meeting & reception costs for all-staff events
- Travel and training not covered by individual library budgets
- Staff costs for UL and Administrative Officer

# CHANGES TO ACCOUNTS AND PRACTICES

## Changes for Acquisitions:

- Inclusion of collection management software & memberships
- More control and transparency for expending Endowment funds
- Head of Collections tasked with oversight of acquisitions, particularly system-wide expenditures

# QUESTIONS & SUGGESTIONS

