

Collections Budget Allocation Practices Survey

Introduction

The University of Washington is conducting a survey to analyze collection budget allocation practices among libraries. Your input will provide important information about current practices as well as future contemplated changes. Your willingness to answer this brief survey, which should take only 10-15 minutes of your time, is greatly appreciated. Interested participants will receive a summary of survey results. Please respond no later than July 31st, 2018.

Preliminary version of this survey was administered with the ALCTS Chief Collection Development Officers at Large Research Libraries in January 2018. Thank you for participating – and thanks to Penn State University Libraries, whose 2013 survey was adapted in the preparation of these questions (<http://dx.doi.org/10.5703/1288284315251>).

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Collections Budget Allocation Practices Survey

* Required

Institutional Demographics

At what type of institution do you work? *

- Public Academic Research Library
- Private Academic Research Library
- Public Library
- National Library
- Other:

What is your Total Student FTE? *

- < 10k
- 10k - 19k
- 20k - 29k
- 30k - 39k
- > 40k
- Not applicable



Number of Bachelor's Degree Fields *

- <24
- 25-49
- 50-99
- 100-199
- > 200
- Not applicable

Number of Doctoral Degree Fields? *

- < 24
- 25 - 49
- 50 - 99
- 100 - 199
- > 200
- Not applicable

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Current Collections Budget Allocation Practices

How do you allocate your budget? *

- Based on historical allocation patterns
- Formula
- Base formula with additional money available by request
- Other:

What is the level of granularity or specificity of your budget? *

- Individual subject funds
- Larger aggregated funds (such as college/school based)
- Mixture, please specify (e.g. different models for serials and monographs)
- Other:



How do you allocate funds for serials/continuing resources? *

- Off the top, as part of a single comprehensive serials line
- Off the top, in separate lines according to serial type, e.g., continuations, databases, e-journals, etc.
- As part of the subject/college/school budget allocations
- Other:

What percent of your library materials budget is typically allocated to serials/ongoing costs? *

- 40 - 50%
- 50 - 60%
- 60 - 70%
- 70 - 80%
- 80 - 90%
- 90 - 100%
- Other:

How do you create funds for new serials? (Check all that apply) *

- Allocation off the top
- From cancellations of existing subscriptions
- From repurposing of monograph funds within a subject/college/school allocation
- Other:



How do you allocate funds for new/emerging needs (e.g., new programs, data, streaming media, etc.)? *

- Off the top as a separate budget line
- Included in subject/college/school budgets
- Other:

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Collections Budget Allocation Practices Survey

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Context and Motivations for Making or Considering Changes to Budget Allocations

Does your Library play a role in planning for new programs? Yes/No

*

Yes

No

If yes, provide a brief description of new program planning.

Your answer

Have you made any changes to the way you allocate your collections budget in the last 5 years? *

Yes

No



If yes, what are your motivations for making or considering changes to your budget allocation model?

- Budget cut
- Staff reorganization
- Changes with University Administration
- Responsibility Centered Management Implementation (e.g. individual academic units the control of revenue and expenditures, including support for library)
- Other:

Are you considering any significant changes now or in the near future to the way you allocate your collections budget? *

- Yes
- No

If yes, what are your motivations for making or considering changes to your budget allocation model?

- Budget cut
- Staff reorganization
- Changes with University Administration
- Responsibility Centered Management Implementation (e.g. individual academic units the control of revenue and expenditures, including support for library)
- Other:



Do you ever share the costs of collection purchases or subscriptions with either of the following (check all that apply): *

- Budgets under the control of other library units on your own campus, e.g., a medical or law
- Budgets under the control of libraries that are part of other campuses in your system
- Budgets under the control of a non-library campus unit
- Not applicable

Is there anything else you would like to add to help frame your responses?

Your answer

Would you be interested in receiving a summary of survey results? *

- Yes
- No

If yes, please provide your contact information: Name, Institution, Position, Email & Phone

Your answer

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