

Budgets on my mind

Changing Budget Allocations to Meet Teaching and Research Needs

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UNIVERSITY LIBRARIES



Overview

Intro & UW Context

Trend Analysis from Survey Data

Compare/Contrast with UW

Conclusion & Next Steps



UW Photos

University of Washington



UW Photos

University of Washington Libraries - Seattle, Washington U.S.A.

Survey trend analysis

Collections Budget Allocation Practices

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About the Survey 1/2

Preliminary version of this survey was administered

- January 2018 with ALCTS Chief Collection Development Officers at Large Research Libraries (CCDO)

Adapted from Penn State University Libraries

- Charleston 2013: Creating a New Collections Allocation Model for These Changing Times: Challenges, Opportunities, and Data by Gregory A. Crawford and Lisa German

About the Survey 2/2

Survey submitted and approved for exempt determination by UW Human Subjects IRB Review

Invitations distributed via email lists and contacts

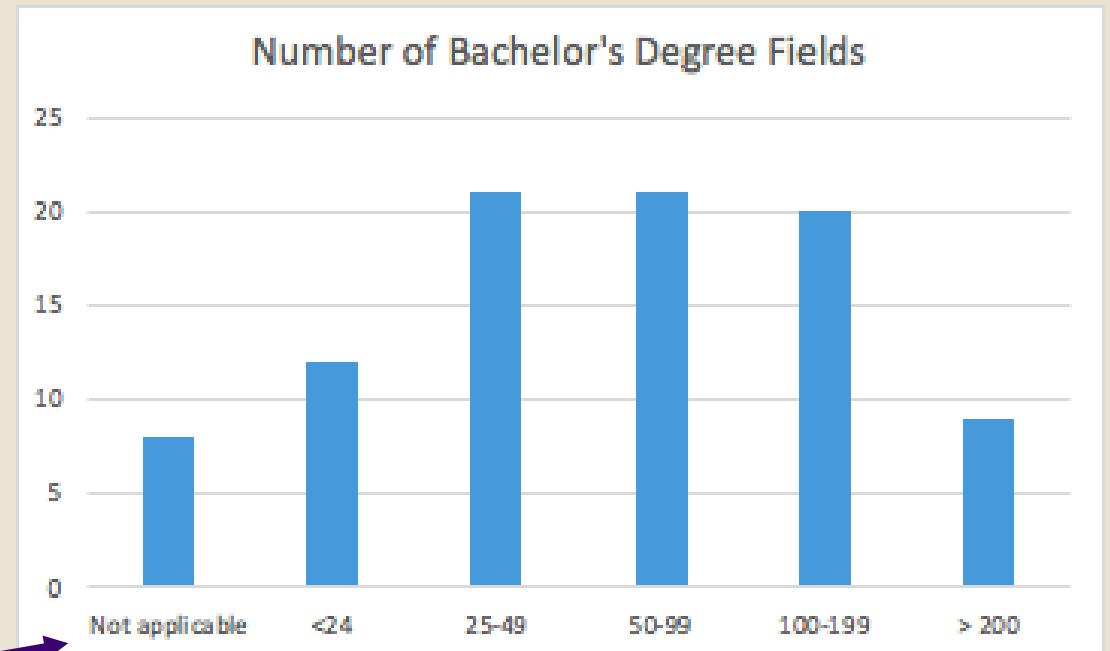
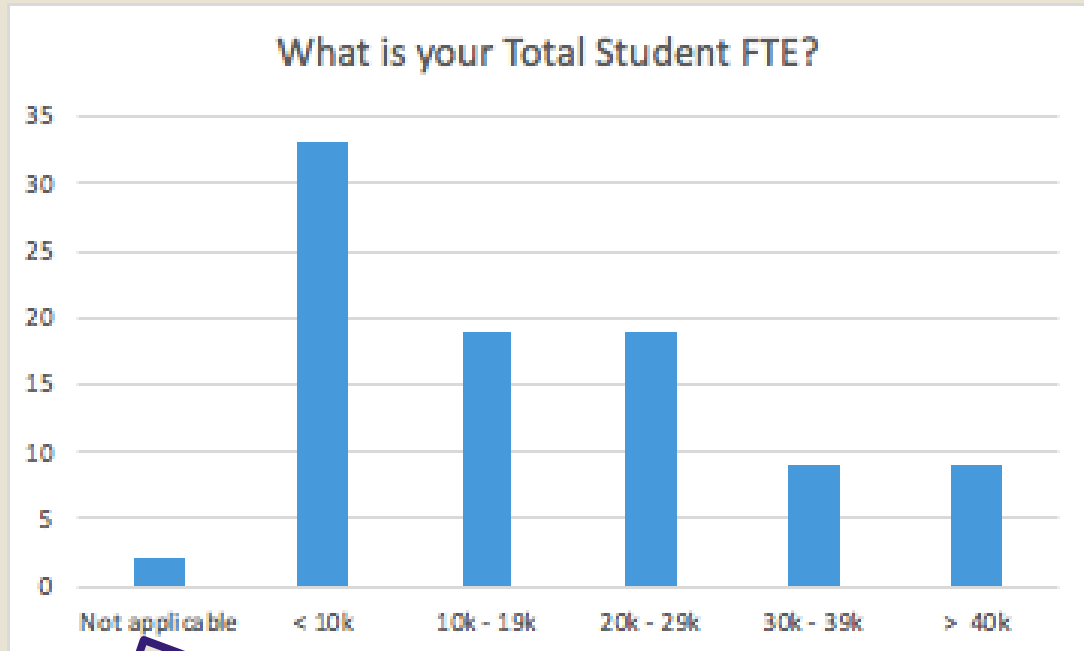
Accepted responses: June 20 to July 31, 2018

Participation from **91** libraries

Survey instrument: 20 questions, mostly multiple choice & check boxes

Institutional Demographics

- 89 or 98% Academic Libraries (2 public libraries)
- $\frac{2}{3}$ offer Doctoral Degrees | 30% offer less than 24 PhDs



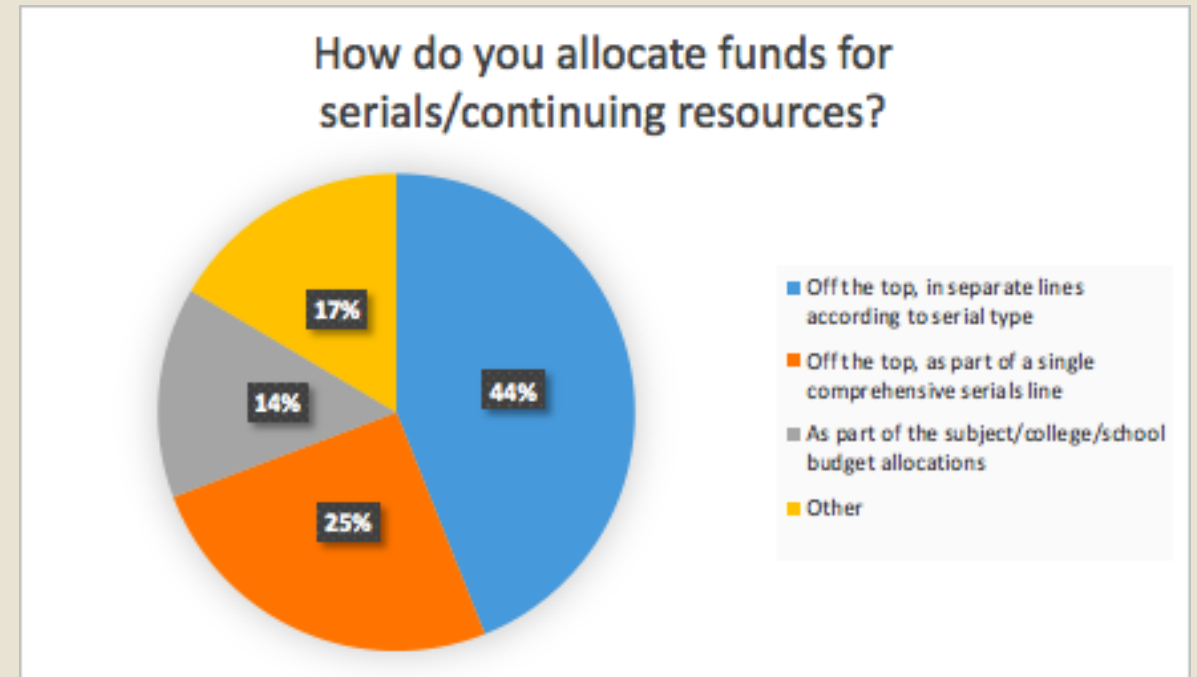
2 Public Libraries

6 Community Colleges

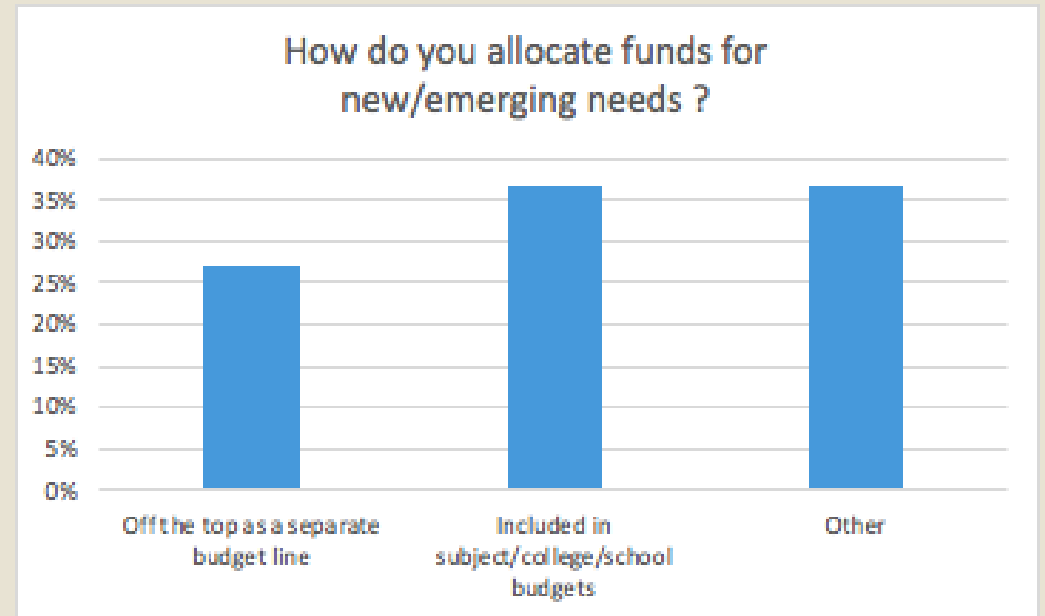
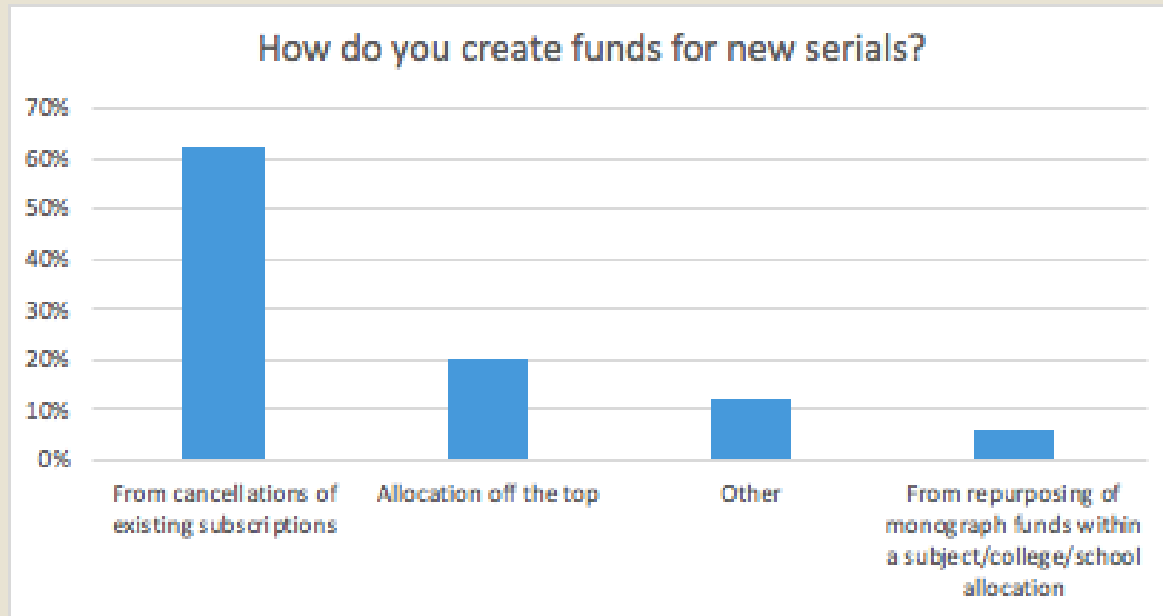
Current Collections Budget Allocation Practices

Trends from Survey Participants

- About half of respondents are currently using historical allocation patterns
- More than third allocate budgets based on individual subject funds
- Majority allocate 70-90% of budget to serials/ongoing costs



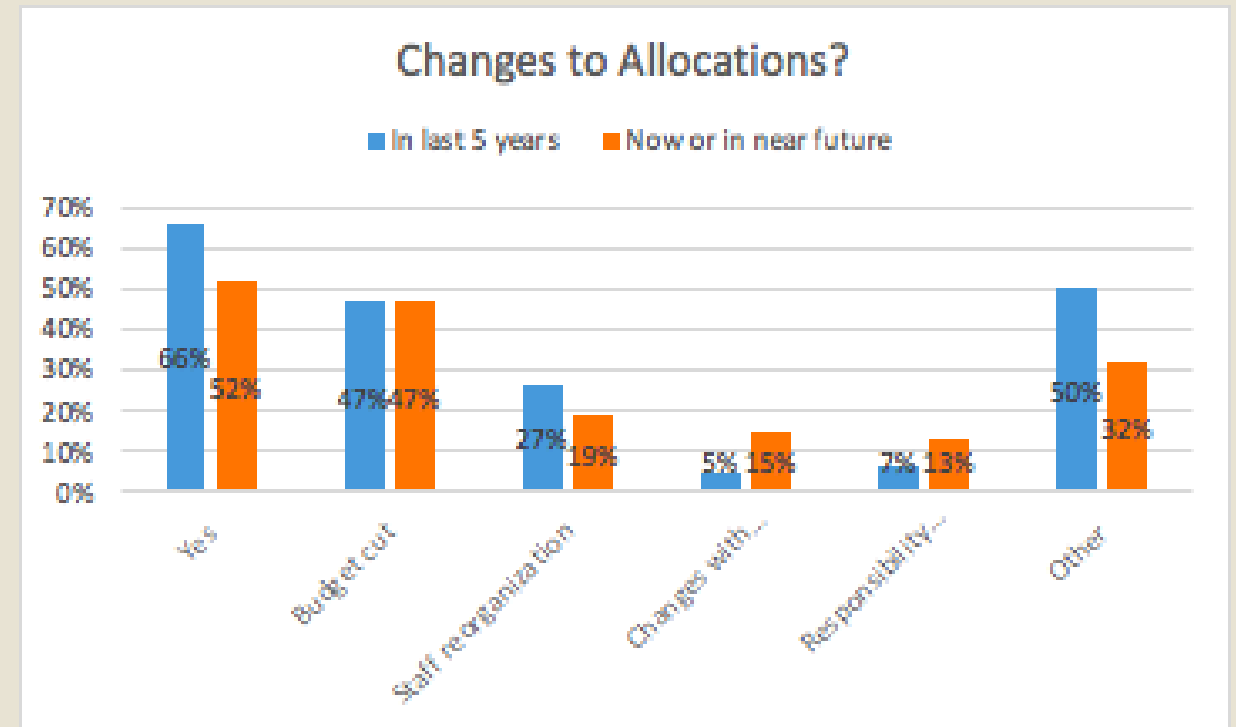
Allocating for New Serial and Programs



Context and Motivations for Changes

Trends from Survey Participants

- Nearly 60% participate in new program planning or utilize a cost share strategy
- 66% made any changes to allocations in the last 5 years
- About half are making changes now or in near future



Compare and Contrast

Case Study: University of Washington

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UW Context

- ~80% overall collections budget allocated to serials and ongoing costs
- Currently allocate to ~70 subject funds
- Allocation based on historical percentages not changed in 20 years
- Multi-year budget review process started in November 2017

We are not alone!

What Did We Learn... and What Next?

- There is no answer
- There are many answers

So... What?

- Bring this home
- Budgets and Strategic Planning
- Budgets and Organizational Change
- and... Tolstoy

Thank you! Questions?

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