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Recommendation #18: Determining what services and programs will be included in the Library expense pool and defining the statistic used for allocating the Library expense pool
Issue number: E-40, E-41, E-54, E-62

Background

The University Library offers a variety of services and support for the university. The expenses associated with the University Library are currently paid centrally through the General Fund. The Budget Model Review and Implementation Committee recommended that the expenses associated Library be included in the Library expense pool and that they be allocated proportionately to primary resource units based on their proportion of a weighted average head count according to the type of employee and student.

Historically, the Office of Institutional Research has reported faculty and staff FTE data based on the October 31st payroll. This has traditionally been considered the Fall term "official" payroll commitment data. Student enrollment data has historically been captured from the 10th day enrollment census file for each term. The Office of the Registrar manages the census file and the data reported through the Office of Institutional Research each term. This reporting has traditionally been considered the university's official student headcount data.

Recommendation

The expenses in the Library expense pool are associated with services offered by the University Library. Specifically, the services include:

- Library (administration and support services)
 - Dean's office
 - Business Services
 - Development Office
 - Human Resources
 - Information Technology Services (e.g., e-Library and public computer work stations)
- Collection and Technical services
- Reference and Instruction services
- Research and Access services
- Materials and Access budget

Allocation statistic

The expenses in the Library expense pool are allocated to primary resource units based on the units' proportion of a weighted average head count according to the type of employee and student. The weights assigned to each type are listed below:

- 3 – faculty full-time equivalent (FTE)
- 3 – graduate and professional student head count

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- 2 – staff full-time equivalent (FTE)
- 1 – undergraduate student head count

For the purposes of this allocation, faculty FTE includes tenured faculty, tenure-track faculty, non-tenure eligible faculty and postdoctoral associates. Staff FTE includes professional and scientific staff, merit staff, and hourly staff (excluding students). Faculty and staff FTE data takes into account all funding sources, excluding agency funding. The Office of Institutional Research's October 31st FTE data from the prior fiscal year will be used as the data source for this allocation statistic. For example, for fiscal year 2009, the Business Services expense pool will be allocated using the Office of Institutional Research's October 2007 FTE data.

For the purpose of this allocation, student head count includes undergraduate, graduate and professional students. This includes both full-time and part-time students as well as on-campus and off-campus students. The Office of the Registrar's prior Fall term 10th day enrollment census data, as reported by the Office of Institutional Research, will be used as the data source for this allocation statistic. For example, for fiscal year 2009, the Student Services expense pool will be allocated using the Office of Institutional Research's 2007 Fall term 10th day enrollment data.