Shared Budget Overview

UM Libraries

Presentation to IFC

11/8/2023

UM Libraries

Scope

Covering today

- Budget model for shared UM System library funds

- Shared collections decisions for those funds

- Working together to support UM System library needs

Not covering today

- Individual campus budget models

- Individual campus collections decisions

We'd be happy to talk to your campus faculty senate

Where/why is this budget hiding?

UM System managed all funds through a central office (Library Systems Office)

→

Library Systems Office became an MU Libraries department – funding shows in MU budget

→

Effort with UM CFO to rework formula; funding same, but a share of those funds is 'assigned' to each campus

Original Model

- System Funding Allocation to Library Systems Office

- Budget managed by LSO with guidance from campuses

Where/why is this budget hiding?

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Effort with UM CFO to rework formula; funding same, but a share of those funds is 'assigned' to each campus

Second Model (2010)

- System Funding Allocation to a separate MU Libraries budget category

- Budget managed by MU Libraries with guidance from other campuses

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Library Systems Office became an MU Libraries department – funding shows in MU budget

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Effort with UM CFO to rework formula; funding same, but a share of those funds is 'assigned' to each campus

Current Model (2023)

- System Funding Allocation to individual campuses

- Campuses place funding in account held at MU Libraries

- Budget managed by MU Libraries with all decisions subject to vote from all campuses

How it works now

Current model fully implemented beginning in FY23

Budget and Distribution by Campus
Total: $2,737,240
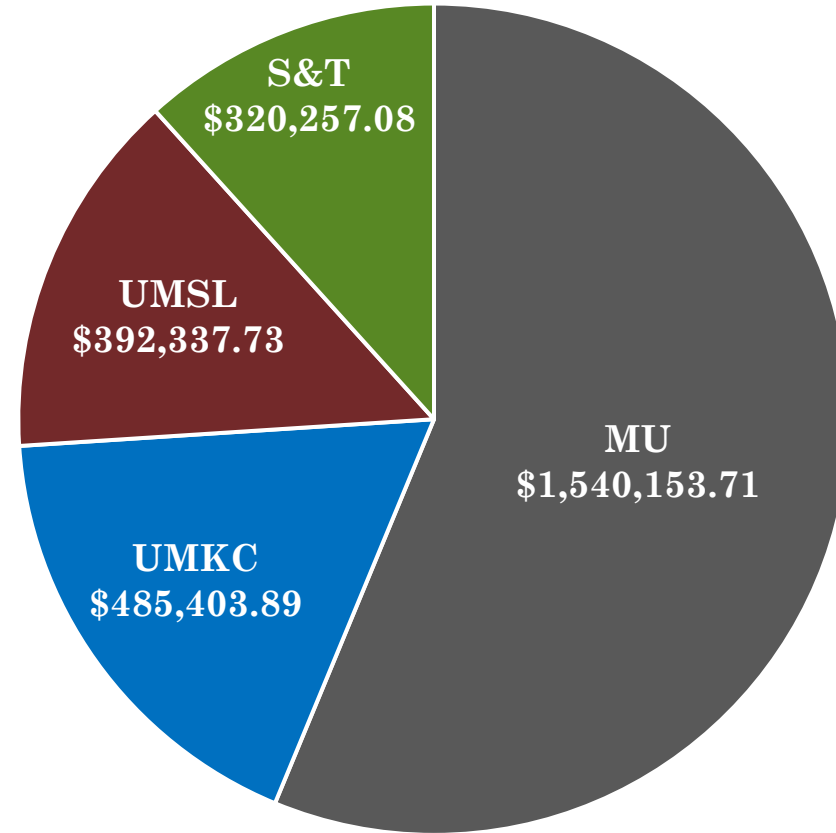
Budget and Distribution by Campus
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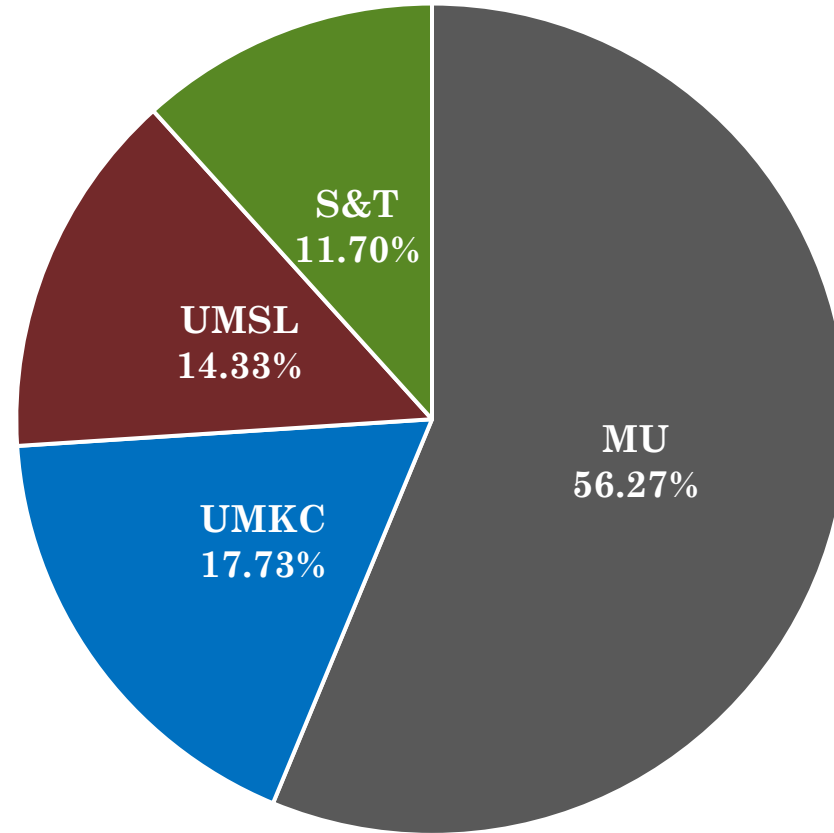
UM Libraries Shared Funding FY19-FY25

REVENUES	FY19	FY20	FY21	FY22	FY23	FY24 (PROJECTED)	FY25 (PROJECTED)
Beginning Balance	$88,765	$49,064	$135,499	$9,221	$0	$628	$0
State Appropriation GRA	$3,257,627	$2,737,240	$2,727,386	$2,737,240	$2,737,240	$2,737,240	$2,737,240
Additional Campus Contributions	$1,069,807	$1,123,801	$327,111	$623,833			
Total Revenues	**$4,416,199**	**$3,910,105**	**$3,189,996**	**$3,370,294**	**$2,737,240**	**$2,737,868**	**$2,737,240**
EXPENSES							
Total Salaries & Wages	$297,516	$114,397	$145,063	$301,027	$335,589	$370,445	$470,613
Total Benefits	$95,049	$51,423	$63,608	$124,904	$132,178	$150,602	$179,542
Total Collections & Other	$3,976,736	$3,604,400	$2,972,104	$2,944,348	$1,443,641	$1,618,866	$1,708,577
Total Expenses	**$4,369,301**	**$3,770,220**	**$3,180,775**	**$3,370,278**	**$1,911,408**	**$2,139,912**	**$2,358,732**
Balance	**$46,898**	**$139,885**	**$9,221**	**$16**	**$825,832**	**$597,956**	**$378,508**

Spending

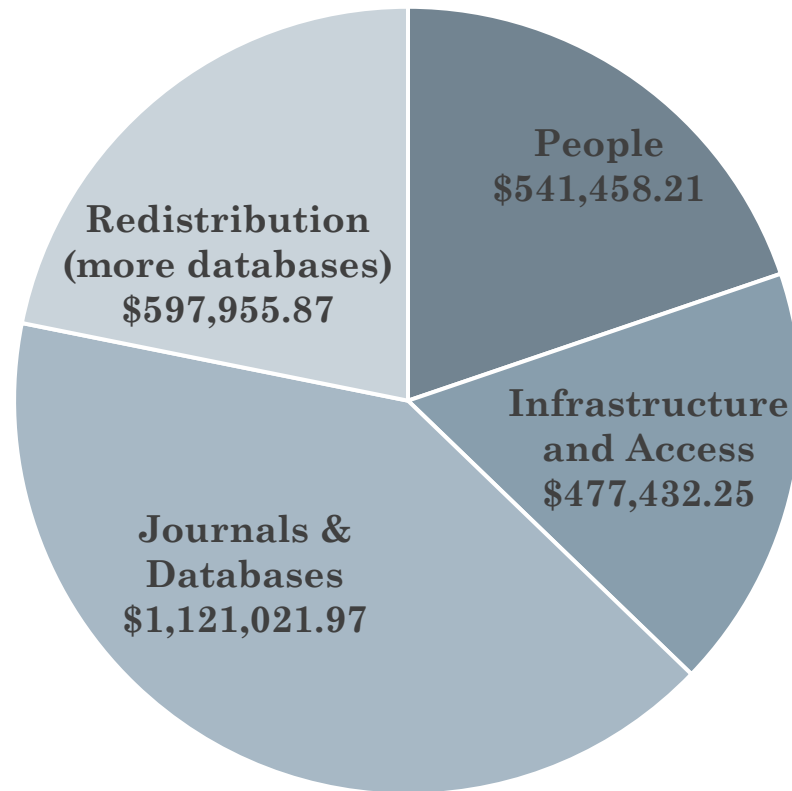| People	Infrastructure	Shared Access	Journals/Databases	Redistribution

• Managing and negotiating shared contracts across the system
• IT staffing to maintain shared systems
	• Behind the scenes technology to support our work in managing
	  • Purchasing
	  • Cataloging
	  • Circulation
	  • Etc.
		• EDS – the way you search for all library resources together
		• MOBIUS – sharing collections across MO
			• ONLY those resources that all campuses want:
			  • Academic Search Premiere
			  • Nature, Nature Research & Reviews
			  • SciFinder
			  • Scopus
			  • PsycInfo
				• Remaining funds – officially returned to campus libraries, but are then used for other shared licensing, coordinated centrally for optimal pricing

Spending Distribution

People
$541,458.21

Infrastructure and Access
$477,432.25

Journals & Databases
$1,121,021.97

Redistribution (more databases)
$597,955.87

■ People ■ Infrastructure and Access ■ Journals & Databases ■ Redistribution (more databases)

Spending Distribution

People 19.78%

Infrastructure and Access 17.44%

Journals & Databases 40.95%

Redistribution (more databases) 21.84%
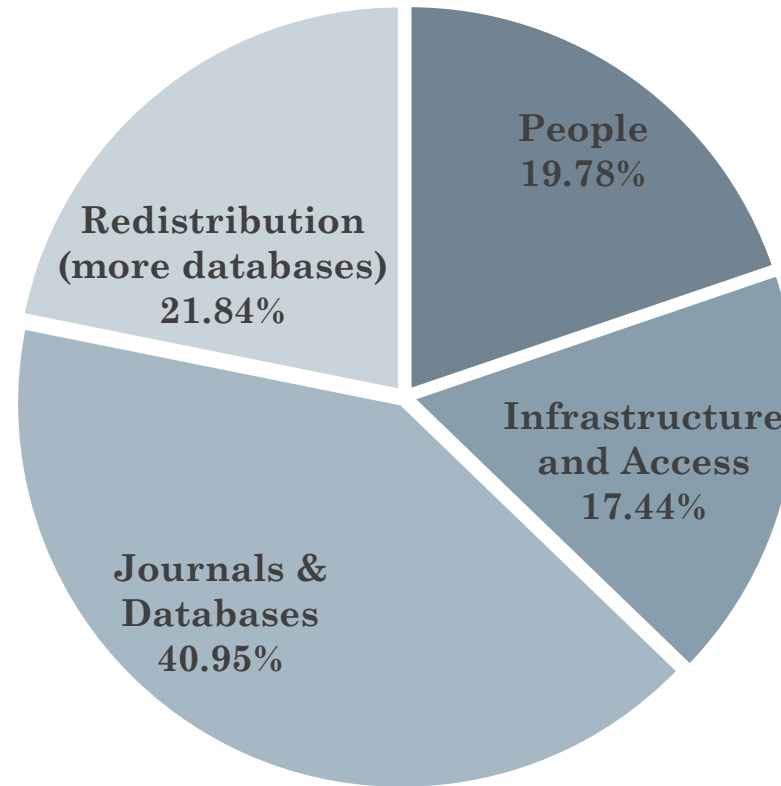
■ People   ■ Infrastructure and Access   ■ Journals & Databases   ■ Redistribution (more databases)

Collections Decision Changes

- Before FY23:
  - Centrally funded a large number of resources (63), with a complex system of campus voting to determine shared resources.
  - Campuses contributed funding to supplement shortage in shared funding.

- Problems with process:
  - Decision-making was a lengthy, often contentious process.
  - System funds supported resources that weren't as supportive of some campuses.
  - Campuses contributed funds to resources that weren't as supportive of their programs.

Collections Decision Changes

- Now (effective FY23):
  - Centrally funded a small number of resources (6), only those to which all four campuses can agree.
  - While it exists, budget surplus is distributed to campuses, where it is used for collections, generally leveraging relationships with other campuses.

- Benefits of process:
  - Decision-making is relatively quick.
  - Funds are used to purchase only those resources needed by any given campus, reducing waste while still leveraging our shared purchasing power.

Decision Making at the System Level
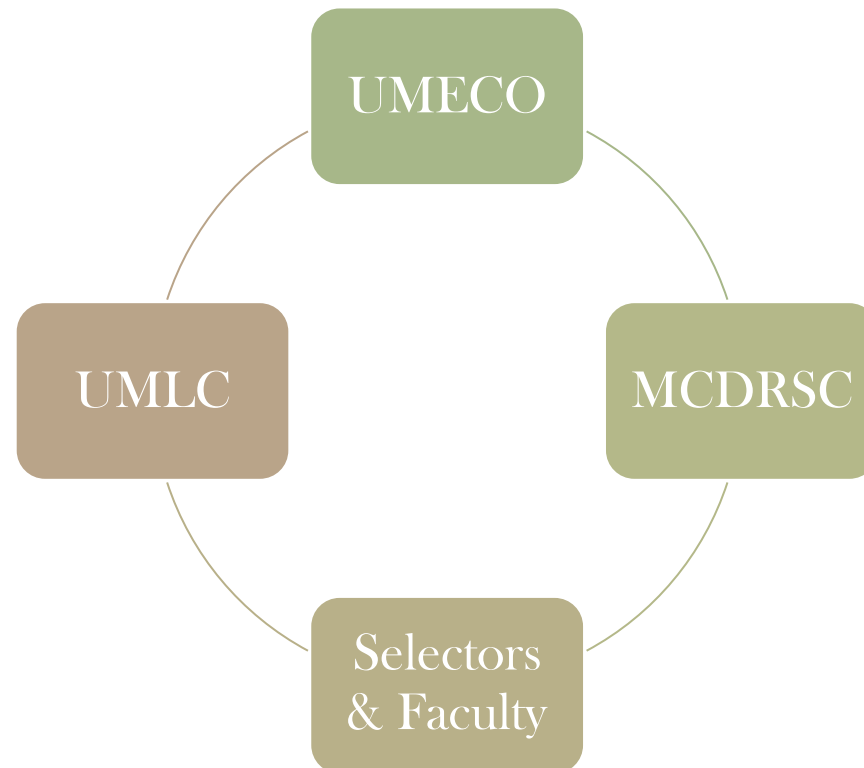
UMECO

University of Missouri System E-Resources Cooperative Office

- Systemwide Shared E-Resources

- Campus E-Resources (1,2,3, or 4 campus participation)

- Affiliate Agreements

- Consortium-Level Agreements (MOBIUS, GWLA)

UM CDRSC

UM Collection Development and Reference Services Committee

- Develops, monitors, and evaluates Shared E-Resources in to promote system-wide excellence in academic research.

- Librarians from all 4 campuses serve on the committee. Chair rotates.

- Advises the UM Library Council on Shared E-Resources matters.

Current UM CDRSC Members

Current members

Mahnken, Sherry L. mahnkens@mst.edu	MS&T	
Chinn, Stephanie schinn@mst.edu	MS&T	
Lewis, Michael michaellewis@mst.edu	MS&T	
Bassett, Cynthia W. bassettcw@missouri.edu	MU	
Alzahrani, Abdulrahman aalzahrani@missouri.edu	MU (currently observing; non-voting)	
Johnson, E Diane JohnsonE@health.missouri.edu	MU	
Whithaus, Rhonda K. WhithausR@missouri.edu	MU	
Salvo, Jen salvoj@umkc.edu Co-chair, 2023-2024 *On leave starting mid/late September through early January*	UMKC	

Linares, Brenda blinares@umkc.edu UMKC sub for Fall 2023	UMKC	
Newcomer, Nara L. newcomern@umkc.edu Co-Chair, 2023-2024	UMKC	
Pluta, Julia plutaj@umkc.edu	UMKC	
Nelson, Timothy Peter NelsonTP@umsl.edu	UMSL	
Daniel, Christopher J. cdaniel@umsl.edu	UMSL	
Fazelian, Jaleh jfazelian@umsl.edu	UMSL	
vacant	UM System	
McCormack, Susan R. mccormacks@missouri.edu	UM System	
Thompson, Jennifer thompsonjf@missouri.edu	UM System	

UMLC

University of Missouri System Library Council

- Consists of Library Deans and key stakeholders from 4 campuses

- Discusses systemwide library matters including Shared E-Resources

- Library Deans cast deciding votes for each campus.

Scholarly Communication is Broken

Faculty*:

Publishers

Peer review

Write articles

Conduct research

Sell back to

libraries

and faculty

for $$$$$$

*and students, and other researchers

How can IFC help

Buy us time to implement creative solutions that will enable us to participate in changing the system

Strategic Intentions

- Sustain meaningful and equitable access to the resources most needed at each campus within the constraints of our budget

- As we can, work together to advocate toward a more sustainable model for scholarly publication and access
  - More equitable approaches to open access author fees through transformative agreements with publishers
  - Institutional repositories for greater exposure to scholarly research and writing
  - Seeking agreement with non-profit publishers that are more supportive of faculty researchers
  - Collaboration with large consortia to develop standards around transformative publishing
  - Guidance for and collaboration with researchers to ensure they receive maximum support in their publishing decisions

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Current

Revenues	FY23	FY24 (projected)	FY25 (projected)	FY26 (projected)	FY27 (projected)	Additional Investment	FY25	% inc	FY26	% inc	FY27	% inc
MU	$1,540,154	$1,540,154	$1,540,154	$1,540,154	$1,540,154	MU	$ -	0%	$ -	0%	$ -	0%
UMKC	$485,404	$485,404	$485,404	$485,404	$485,404	UMKC	$ -	0%	$ -	0%	$ -	0%
UMSL	$392,338	$392,338	$392,338	$392,338	$392,338	UMSL	$ -	0%	$ -	0%	$ -	0%
MS&T	$320,257	$320,257	$320,257	$320,257	$320,257	MS&T	$ -	0%	$ -	0%	$ -	0%
Expenses	$1,911,408	$2,139,912	$2,358,732	$2,618,193	$2,906,194	Total	$0		$0		$0	
Balance	$825,832	$597,956	$378,508	$119,960	($168,041)							

Sustain

Revenues	FY23	FY24 (projected)	FY25 (projected)	FY26 (projected)	FY27 (projected)	Additional Investment	FY25	% inc	FY26	% inc	FY27	% inc
MU	$1,540,154	$1,540,154	$1,663,630	$1,809,106	$1,971,155	MU	$123,476	8%	$268,952	15%	$431,001	22%
UMKC	$485,404	$485,404	$524,319	$570,169	$621,241	UMKC	$38,915	8%	$84,765	15%	$135,837	22%
UMSL	$392,338	$392,338	$423,792	$460,851	$502,131	UMSL	$31,454	8%	$68,513	15%	$109,793	22%
MS&T	$320,257	$320,257	$345,932	$376,183	$409,879	MS&T	$25,675	8%	$55,926	15%	$89,622	22%
Expenses	$1,911,408	$2,139,912	$2,358,732	$2,618,193	$2,906,194	Total	$219,521		$478,155		$766,253	
Balance	$825,832	$597,956	$598,942	$598,115	$598,211							

Grow

Revenues	FY23	FY24 (projected)	FY25 (projected)	FY26 (projected)	FY27 (projected)	Additional Investment	FY25	% inc	FY26	% inc	FY27	% inc
MU	$1,540,154	$1,540,154	$1,771,177	$2,036,853	$2,342,381	MU	$231,023	15%	$496,700	24%	$802,228	34%
UMKC	$485,404	$485,404	$558,214	$641,947	$738,239	UMKC	$72,811	15%	$156,543	24%	$252,835	34%
UMSL	$392,338	$392,338	$451,188	$518,867	$596,697	UMSL	$58,851	15%	$126,529	24%	$204,359	34%
MS&T	$320,257	$320,257	$368,296	$423,540	$487,071	MS&T	$48,039	15%	$103,283	24%	$166,814	34%
Expenses	$1,911,408	$2,139,912	$2,358,732	$2,618,193	$2,906,194	Total	$410,723		$883,054		$1,426,235	
Balance	$825,832	$597,956	$790,143	$1,003,014	$1,258,194							

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Questions for IFC

- What are your priorities as a body – journals, or fixing the larger problem?

- Would you be willing to take a leadership role in promoting changes to the scholarly communications system, with our support?
  - Some disciplines have structures in place; others do not
  - P&T guidelines sometimes limit out different kinds of publishing/require certain journals
  - Advocating with your scholarly societies to move to open access options for top journals

- How can we work together over time to promote these changes?

Questions from IFC?

Shared Distribution/Cost Responsibility

UM Shared Operational Costs				
Distribution by campus	SCH	Enrollment	Research	**Equal Weight**
MU	48.9%	42.6%	77.3%	**56.3%**
UMKC	22.5%	23.3%	7.4%	**17.7%**
UMSL	16.5%	22.7%	3.8%	**14.3%**
S&T	12.1%	11.5%	11.5%	**11.7%**
				100.0%