

FY2023 Operational Review Committee Final Report

Unit Reviewed: Library
Date: April 2023

Unit Presentation Requirements

The following items are required materials for the unit presentations. The units presented to the committee and questions were encouraged. The units provided additional or supplemental information as deemed appropriate.

- General Information to “Tell Your Story”
 - How unit aligns to University goals
- Organizational Chart and Position / Staffing Information
- Opportunities and Strengths
- What is going well? What requires improvement?
- Key Performance Indicators, Benchmarks, and Surveys
- Five Year Financial Pro-forma
- Reserves and Balances

Goals and Initiatives

- The mission of the UTSA Libraries and Museums is to advance research and education, stimulate discovery and creativity, and engage and transform diverse communities with distinctive expertise, high-quality information resources, inspirational spaces, and innovative and responsive services.
- Their aim to gain admission into the Association of Research Libraries by 2028 is a tangible and measurable goal that aligns with UTSA's aspirations to be a great research university.
- The presentation was a good articulation of the unit's story, highlighting changes and growth in recent years, as well as illustrating the breadth of unit services.
- The Libraries and Museums’ strategic plan identifies 3-4 goals to support each of UTSA's three destinations, with a strong thread of purpose told through strategic investments and projects for each destination.
- This unit focuses on strategic investments first, and projects second. This approach ensures they resist chasing after "new shiny objects,” but rather prioritize the core information, service and infrastructure needs of our faculty and students. The creation of the Faculty Center is a good illustration of their user-first approach to initiatives.

- The business model for the Institute of Texan Cultures is in flux due to a visioning process still in progress, and clarity around its future and goals will be important for the UTSA Libraries and Museums to steward this resource effectively.

Organization

- Overall: Dean Hendrix pointed out the critical role UTSA Libraries and Museums played in reaching R1 status. The Libraries not only serves the entire student population, the faculty but also the greater San Antonio residents. Whether these services are through providing scholarly journal articles for faculty research or students, to providing study and collaborative space for students, or providing access to museum collection at the ITC or Southwest Campus while serving as the “cultural front door” for the university. In the everchanging environment of student and faculty needs the is obvious that the Libraries strives to meet those needs whether it’s from the having dedicated librarians for the colleges to help with gathering literature for research, to providing the most current available collections, to keeping up with technology changes, to meeting spaces for students and faculty. Dean Hendrix did an excellent job of highlighting the organizational goals and objectives.
- Staff: While the UTSA Libraries and Museums a very large and diverse staff of full-time employees, there is a little ambiguity in what some of the groups are responsible for. Obviously, some of the roles are self-explanatory when it comes to the librarians, but other groups were not elaborated on they were either just mentioned in passing or were left to the group to infer what those groups did. It’s an amazing feat that the library is staffed 24/5 and in order to meet the needs of the students.
- Financial: The financial information presented was useful to understand how the division’s resources have been used. It was also interesting to learn about how the increase in electronic books has allowed the library to shift resource to other areas of need. It was also eye opening to learn how expensive the collections cost. UTSA Libraries and Museums is an important hub for the university and it is crucial that they maximize their resources and space utilization.

Operations

- UTSA Libraries and Museums operates four libraries (JPL, Downtown library, applied engineering and technology library), two museums (Institute of Texan Cultures and UTSA Southwest Ursuline Museum), manage 2700+ pieces of artwork, and have two special collections (ITC and Graduate School and Research Building)
- The division is 74% fee funded from students and struggle with compounded cost increases (including an R1-treated increase), state budgets models, and preservation costs—along with the aging infrastructure costs that all units report. They make data-driven decisions about what to increase/decrease in largely electronic holdings.

- The Libraries and Museums have maintained a \$1/engagement costs, which is much lower than in-state peer expenses.
- The Libraries and Museums have roughly 100 staff and have made staff investments in digital scholarship and scaling instruction in the online environment. While staff salaries are low, the Libraries and Museums are compensating with hybrid work and flexible schedules.
- User satisfaction is the highest priority, despite struggles in adapting to post-pandemic interests/needs.

Finance

- Dean Hendrix should be commended for his excellent, informative, and efficient presentation.
- The financial sub-committee found the UTSA Libraries and Museums' financial report transparent and understandable.
- The comparative assessment of KPIs against peer-universities at different levels was excellent.
- The only critical comment is that the division's financial health does seem to depend upon their receipt of SIF funds, but those do seem to be well-utilized.
- The financial sub-committee were impressed with the significant positive operating margin on the proforma income statement, noting that while the surplus is trending lower year-over-year. They appear financially healthy for the foreseeable future.

Assessment

- Overall, the UTSA Libraries and Museums does a very good job aligning its mission with the University's goals.
- The Libraries and Museums provided the committee with substantial evidence that their core values and mission align with the University's goals for student success, strategic growth, and innovative excellence. Specifically, their goal to gain admission into Association of Research Libraries by 2028 is a tangible, measurable goal that aligns with UTSA's aspirations to be a great research university.
- The Libraries and Museums did a great job communicating their purpose and alignment to university destinations and goals. They described a library that has faced a number of growth challenges and is poised for future growth as an R1 university library.
- We would like to thank Libraries and Museums for providing a compelling, informative, and thorough presentation. We would like to see a little more clarity between the KPIs and their relationship to the University's goals. While they did a good job, the financial/KPI aspects of their narrative were a little rushed. That said, the information presented was comprehensive and well-articulated.
- Libraries and Museums has led efforts to create a thoughtful and well-planned organizational shift that reflects both the library and university's changing needs in the

aftermath of the Covid-19 pandemic. Their emphasis on modern library science methods that highlights user accessibility over physical ownership of printed books and journals allows them to maximize their budget is evident.

- While short staffed based on national data, Dean Hendrix leadership has fostered an esprit d'corps among a dedicated staff, a willingness to be both flexible and adaptive, and an interest in improving user services and access. Although understaffed, the Library does an excellent job maximizing opportunities as an enterprise working within a rapidly changing information resource landscape.
- Libraries and Museums demonstrates a highly user-friendly focus and serve as a campus model in this regard. It's noteworthy that they have been willing to pursue strategic investments that fall outside the traditional realms of an academic library, with the foresight to see how their areas of expertise can contribute to the university in different ways.
- The KPIs shared by Libraries and Museums show a strong emphasis on multiple methods of user feedback: surveys, focus groups, and evaluations that measured user satisfaction, facilities usage, collection use, service use, and website use. User satisfaction numbers are on an upward trend. Facilities use is not up to where it was pre-pandemic, but we believe that this is not reflective of their performance, but rather due to the increased number of hybrid and online courses as a result of the Covid-19 pandemic.
- Libraries and Museums presented benchmarking data from the LibQUAL annual campus-wide survey on user satisfaction highlights both user satisfaction (which is improving) and the success of their e-book strategy relative to peer institutions (far exceeds other institutions).
- The division's resource planning appears to be well aligned with its stated mission and goals. Dean Hendrix's presentation described their intent to maintain a sense of nimbleness in a fast-changing environment that anticipates future technology and software advancements and challenges.
- Libraries and Museums has positioned itself to prioritize revenues and resources to meet the specific needs of the University while addressing both the financial constraints and physical challenges that are beyond their control. We believe that this a real strength. The Libraries and Museums have clear strategies in place to address financial challenges (many of which are out of their control due to external cost increases). Their strong user-orientation has driven their decisions around facilities and collections.
- The committee wishes to note that there were very few weaknesses in the Libraries and Museums' presentation. We request that more information be provided regarding the costs incurred with the integration of the ITC and the UTSA Southwest Campus.
- Libraries and Museums provided a clearly articulated, metric-focused presentation. Their narrative gave the committee a good sense of the complexity of the Library's work overseeing operations on four campuses. We commend their efficient and thorough presentation.



Incentivized Resource Management Operational Review

UTSA Libraries & Museums

March 29, 2023

UTSA Libraries and Museums

LIBRARIES

- John Peace Library (JPL)
- Downtown Library (DTL)
- Applied Engineering and Technology Library (AET)
- Special Collections (ITC)

MUSEUMS

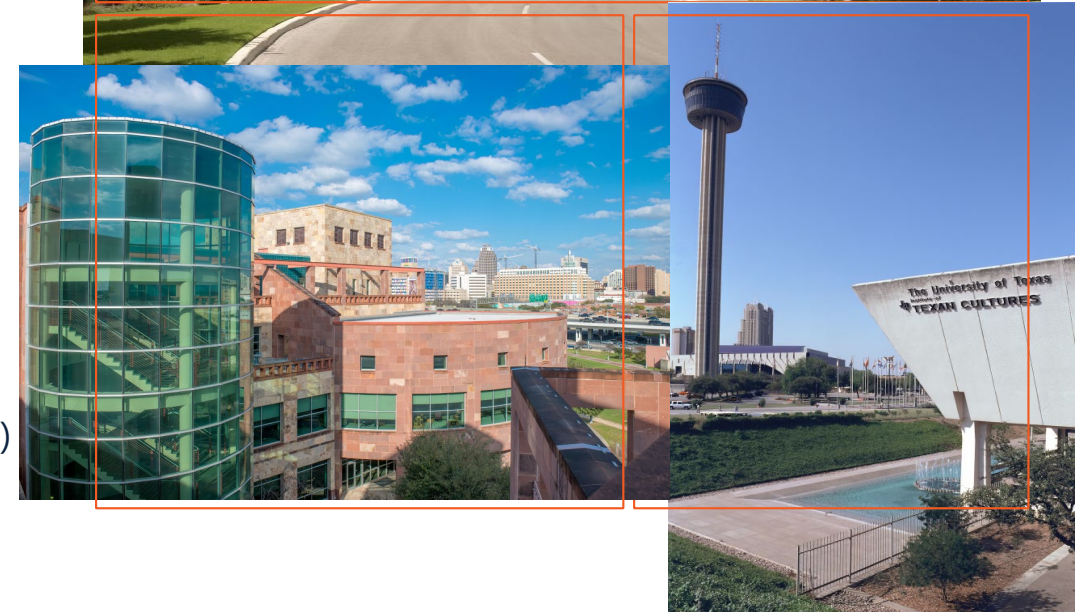
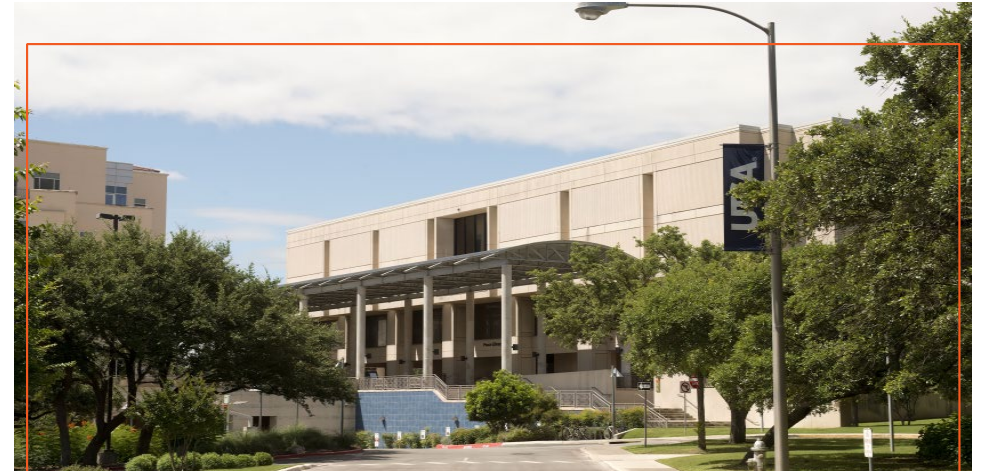
- Institute of Texan Cultures (ITC)
- Ursuline History Center at UTSA Southwest

UTSA ART COLLECTION

- 2700+ artworks

WORKSPACES/COLLECTIONS STORAGE

- Special Collections @ Graduate School and Research Building (GSR)
- Special Collections @ the Institute of Texan Cultures



Vision and Mission

Vision

- As a nationally recognized research library, we fuel UTSA's ascent to becoming a premier public research university.

Mission

- The UTSA Libraries advance research and education, stimulate discovery and creativity, and engage and transform our diverse communities by providing distinctive **expertise**, high-quality information **resources**, inspirational **spaces**, and innovative and responsive **services**.

Destination 1: UTSA Libraries will be a model for supporting student success.

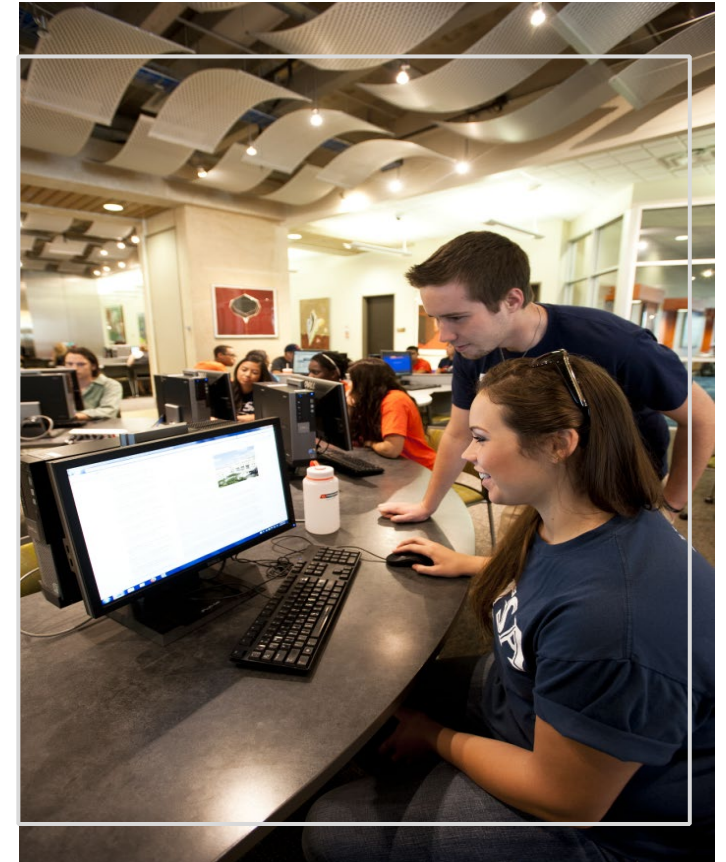
Goal 1: Create user experiences that advance teaching, learning, research and student success.

Goal 2: Be a national model for Hispanic-thriving libraries.

Goal 3: Partner with faculty to advance innovative teaching, learning, research and scholarship.

Strategic Investments: Heart of the Campus, OER, User Experience (physical and digital), Diversity, Equity and Inclusion, Digital Scholarship, Special Collections, Adaptability/Responsiveness to Changes in Higher Education, User Service

Projects: Leganto, CDL, [Third Floor Project](#), Room Reservation, Physical Collection Reduction



Destination 2: UTSA Libraries will be a nationally recognized research library.

Goal 1: Establish and grow new revenue streams.

Goal 2: Continue to build distinctive research collections documenting the diverse histories and development of San Antonio and South Texas.

Goal 3: Strategically expand our collections and services supporting UTSA's research enterprise.

Goal 4: Create an infrastructure to advance digital scholarship initiatives.

Strategic Investments: Community Engagement, Diversity, Equity and Inclusion, Research Infrastructure, Special Collections, Digital Preservation and Stewardship, Scholarly Communication, Digital Scholarship

Projects: History of Music Book, UTSA Press, Mexican American Civil Rights Tour, Digital Repository, Digital Preservation Framework



Destination 3: UTSA Libraries will be an exemplar for organizational effectiveness and innovation.

Goal 1: Continuously improve the processes that fuel our goals.

Goal 2: Cultivate strategic intramural and extramural partnerships.

Goal 3: Recruit, develop and retain excellent and diverse staff.

Goal 4: Develop skill sets for critical and emerging areas.

Strategic Investments: Project Management, Governance, Assessment, Professional Development, Diversity, Equity and Inclusion, Community Engagement, Process Improvement, Optimizing Work Modalities

Projects: Assessment Tool and Data Governance (replace LibPas), Staff Work Modalities, Box Tracking Tool, Leganto, CD



It all starts with our users...

- Undergraduates
 - Heavy facilities usage
 - Textbook affordability
- Graduate Students
 - Use facilities and collections
- Faculty & Staff
 - Primarily use collections
 - High touch services
- SA Community
 - Cultural “front door” to UTSA





Collections

CHALLENGES	OPPORTUNITIES
<ul style="list-style-type: none">• Compounded cost increases: Library materials inflation and R1 "tax"• UT System Direct Funding• Locked into inflexible content packages• Evolving information needs: data• Preservation and storage of distinctive materials• Traditional notions of libraries	<ul style="list-style-type: none">• Heavy use by all user types (6.6M)• Collaborative, diverse, and data-driven purchasing• Faculty-library liaison program• Distinctive regional collections• Richer connection to the research enterprise (e.g., InCites)

Facilities

CHALLENGES	OPPORTUNITIES
<ul style="list-style-type: none">• We manage 316,873 sq. ft. + 14.7 acres• Aging infrastructure• Student study space• Modern storage space for distinctive collections• 24/5	<ul style="list-style-type: none">• 750K annual visits in FY2022, 1M projected for FY2023• Reclaiming space for students• User experience research• Faculty Center• ITC Legislative Appropriations Request

Services

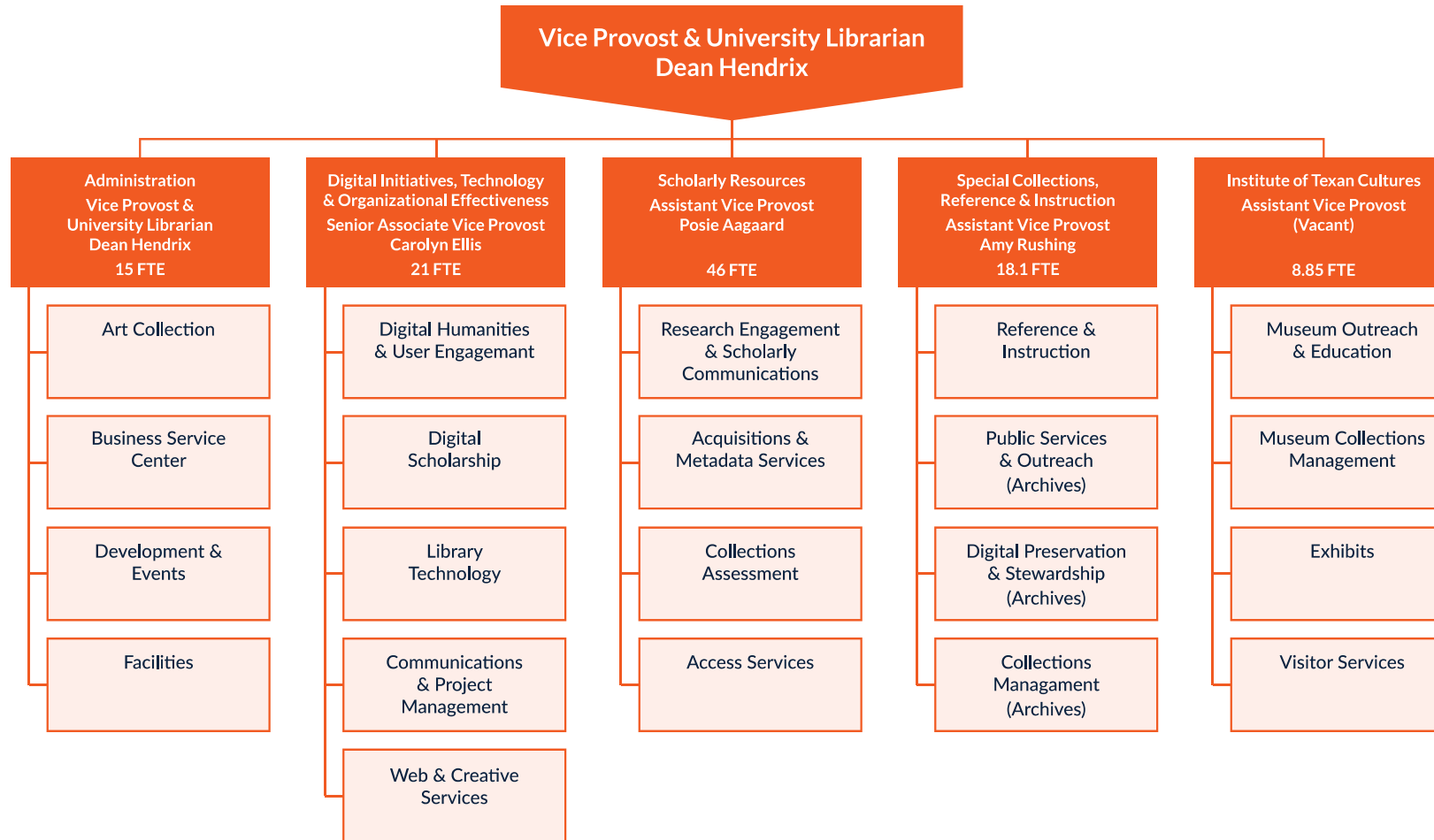
CHALLENGES

- Pandemic changed our users and higher education
- Delivering services/education virtually
- Technological disruptions
- Discoverability of resources
- Providing equitable access to resources

OPPORTUNITIES

- OER initiatives
 - Saved students \$10M in textbook costs
- Special collections philosophy
- Self-service options
- High touch services
- Scaling up support for the research enterprise
- Good relationship with SAPL and school districts

Positions and Staffing (Organizational Chart)



Staffing

CHALLENGES

- Recruitment and retention of staff
- Providing competitive salaries
- Change management

OPPORTUNITIES

- Flexible work arrangements
- Grow your own talent
- Developing capacity in strategic areas
- Student employees

UTSA Libraries & Museums KPIs

Incremental Continuous Improvement

User Satisfaction

Service Use

Collections Use

Web use

Facilities Use

Revenue Generation

	2015	2017	Δ% 2015- 2017	2019	Δ% 2017- 2019	2023 (aspirational)	Δ% 2019- 2023
User satisfaction (Perceived level of service)	7.45	7.6	2%	7.68	1%	7.78	1.3%

	2019	2020	Δ% 19-20	2021	Δ% 20-21	2022	Δ% 21-22	2023 (aspirational)	Δ%
Facilities Use	1,650,606	1,113,779	-32%	162,225	-85%	749,108	362%	1,113,779	49%

Benchmarking

LibQUAL+: User satisfaction Gap Index (2019)

iPEDS (2021)

Library	Services	Collections	Facilities	Overall		Staff FTE	Students per Staff member	Librarians FTE	Total physical books	Total e-books	Library
UTSA	-0.02	-0.18	-0.47	-0.20		125	278	37	595,201	6,844,788	UTSA
Texas State	-0.37	-0.58	-0.59	-0.50		174	218	39	854,777	1,161,289	Texas State
UT - Arlington	-0.35	-0.54	-0.60	-0.48		208	220	44	762,076	1,088,525	UT - Arlington
Texas Tech	-0.34	-0.50	-0.58	-0.46		176	230	53	2,988,821	186,930	Texas Tech
UT - Dallas	-0.14	-0.46	-0.84	-0.45		62	479	21	1,210,008	1,671,851	UT - Dallas
ARL Libraries	-0.29	-0.57	-0.65	-0.50		140	335	55	1,591,633	904,325	UHouston

Budget Planning

- Zero-based budgeting process
- Highly collaborative: Dept budgets link to strategic plan
- Plan for unpredictability
 - SCH
 - Inflation and vendor contract changes
 - Salary savings
 - Merit
 - Facility contingencies
- Relative inflexibility of fixed costs
 - Salaries + Benefits
 - Collections
 - Some flexibility in M&O
- Efficiencies
 - Centralized administrative services
 - Centralized resource management
- Gated SIFF integrates SIFF process into making capital investments



FY 23 Revenue

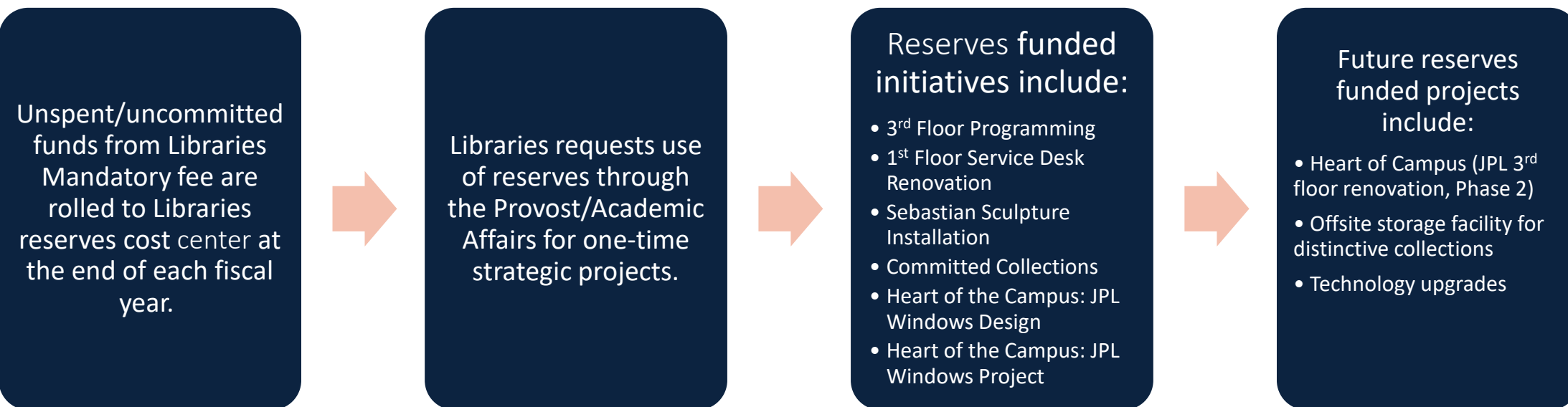
Revenue	Amount	%
Mandatory Fee- Libraries	\$12,754,000	73%
UT System Direct Funding	\$2,328,437	13%
State Appropriation - Special Item - ITC	\$1,001,612	6%
E&G	\$425,039	3%
Endowments	\$298,272	2%
Grants	\$240,442	1%
Designated Tuition	\$197,460	1%
Net Sales & Services	\$161,956	1%

FY 23 Expenditures

Expenditures	Amount	%
Personnel <ul style="list-style-type: none"> • Staff Salaries • Staff Benefits • Student Wages 	\$7,784,885	51%
Collections	\$5,826,329	39%
M&O <ul style="list-style-type: none"> • Facilities • Technology • Memberships • Professional Development • Software as a Service • Events 	\$1,512,895	10%

Reserves

Year	Beginning Balance	Expenses	Transfer In	Year-End Sweep	Year-End Balance
2019	\$1,181,659	\$(250,000)		\$1,396,900	\$2,328,559
2020	\$2,328,559	\$(333,760)		\$156,553	\$2,151,352
2021	\$2,151,352	\$(2,132,486)		\$1,192,834	\$1,211,700
2022	\$1,211,700	\$(600,000)	\$533,371	\$1,433,376	\$2,578,447
2023	\$2,578,447	\$(447,869)	\$562,194		\$2,692,773





Questions?



Libraries & Museums

5-Year Proforma with Projected Revenues and Expenses

Revenues														
Fees														
	FY 2021 Actuals	\$ Change	% Change	FY 2022 Actuals	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	\$ Change	% Change	FY 2025 Projection	Assumptions
Student Fees - Mandatory	12,603,748	314,582	2%	12,918,330	(164,330)	-1%	12,754,000	(51,200)	0%	12,702,800	-	0%	12,702,800	FY24 Budget Projection, zero growth projected for FY25
(A) Total Fees	\$ 12,603,748	\$ 314,582	2%	\$ 12,918,330	\$ (164,330)	-1%	\$ 12,754,000	\$ (51,200)	0%	\$ 12,702,800	\$ -	0%	\$ 12,702,800	
Gifts, Endowment & Other Income														
	FY 2021 Actuals	\$ Change	% Change	FY 2022 Actuals	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	\$ Change	% Change	FY 2025 Projection	Assumptions
Endowment Distributions	296,010	(7,382)	-2%	288,628	9,644	3%	298,272	24,483	8%	322,755	3,012	1%	325,767	New Arturo Almeida endowment earnings in FY24
(B) Total Gifts, Endowment, & Other Income	\$ 296,010	\$ (7,382)	-2%	\$ 288,628	\$ 9,644	3%	\$ 298,272	\$ 24,483	8%	\$ 322,755	\$ 3,012	1%	\$ 325,767	
Other Revenue														
Explain Other Revenue Sources (Insert Additional Lines as needed)	FY 2021 Actuals	\$ Change	% Change	FY 2022 Actuals	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	\$ Change	% Change	FY 2025 Projection	Assumptions
Sales & Services	8,110	18,382	227%	26,492	135,464	511%	161,956	27,544	17%	189,500	276,300	146%	465,800	Add Asian Festival in FY23 & TFF in FY25
Transfer In	193,600	-	0%	193,600	3,860	2%	197,460	-	0%	197,460	-	0%	197,460	Designated Tuition
Transfer In	1,238,488	38,582	3%	1,277,070	(852,031)	-67%	425,039	875,136	206%	1,300,175	21,377	2%	1,321,552	E&G
Transfer In	932,112	69,500	7%	1,001,612	-	0%	1,001,612	-	0%	1,001,612	-	0%	1,001,612	State Appropriation - Special Items
Transfer In	161,914	(161,914)	-100%	-	240,442	-	240,442	(240,442)	-100%	-	-	-	-	Grants Awarded to the Libraries (One-time)
Transfer In	1,390,938	-	0%	1,390,938	937,499	67%	2,328,437	(937,499)	-40%	1,390,938	-	0%	1,390,938	UT System Direct Funding for Materials
(C) Total Other Revenue	\$ 3,925,162	\$ (35,450)	-1%	\$ 3,889,712	\$ 465,235	12%	\$ 4,354,946	\$ (275,261)	-6%	\$ 4,079,685	\$ 297,677	7%	\$ 4,377,362	
Total Unit Revenue before Strategic Investment Outflow														
	FY 2021 Actuals	\$ Change	% Change	FY 2022 Actuals	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	\$ Change	% Change	FY 2025 Projection	Assumptions
(D) Total Unit Revenue before Strategic Investment Outflow (A+B+C)	\$ 16,824,920	\$ 271,750	2%	\$ 17,096,670	\$ 310,548	2%	\$ 17,407,218	\$ (301,978)	-2%	\$ 17,105,240	\$ 300,689	2%	\$ 17,405,929	
Strategic Investment Fund (SIF) Participation														
Amount transferred out for Strategic Investment Fund Participation	FY 2021 Actuals	\$ Change	% Change	FY 2022 Actuals	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	\$ Change	% Change	FY 2025 Projection	Assumptions
Strategic Investment Participation (14%)	(870)	(1,880)	216%	(2,750)	(19,924)	725%	(22,674)	(3,856)	17%	(26,530)	(38,682)	146%	(65,212)	
Strategic Investment Participation - Mandatory Fees (5-8%)	(630,220)	(404,670)	64%	(1,034,890)	14,570	-1%	(1,020,320)	4,096	0%	(1,016,224)	-	0%	(1,016,224)	
(E) Total Strategic Investment Fund Participation	\$ (631,090)	\$ (406,550)	64%	\$ (1,037,640)	\$ (5,354)	1%	\$ (1,042,994)	\$ 240	0%	\$ (1,042,754)	\$ (38,682)	4%	\$ (1,081,436)	
Total Unit Revenue														
	FY 2021 Actuals	\$ Change	% Change	FY 2022 Actuals	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	\$ Change	% Change	FY 2025 Projection	Assumptions
(F) Total Unit Revenue (D-E)	\$ 16,193,830	\$ (134,800)	-1%	\$ 16,059,030	\$ 305,194	2%	\$ 16,364,224	\$ (301,738)	-2%	\$ 16,062,486	\$ 262,007	2%	\$ 16,324,493	

Expenses														
Support Unit Expense Allocation														
Amount transferred out for Support Unit Expense Allocations	FY 2021 Actuals	\$ Change	% Change	FY 2022 Actuals	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	\$ Change	% Change	FY 2025 Projection	Assumptions
Academic Support Unit	NA	-	-	NA	-	-	NA	-	-	NA	-	-	NA	
Administrative Support Unit	NA	-	-	NA	-	-	NA	-	-	NA	-	-	NA	
(G) Total Support Unit Expense Allocation	\$ -	\$ -	-	\$ -	\$ -	-	\$ -	\$ -	-	\$ -	\$ -	-	\$ -	
Direct Personnel Expenses														
Personnel Expenses	FY 2021 Actuals	\$ Change	% Change	FY 2022 Actuals	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	\$ Change	% Change	FY 2025 Projection	Assumptions
Faculty & TA Salary	10,142	1,108	11%	11,250	15,475	138%	26,725	(3,545)	-13%	23,180	463	2%	23,643	
A&P and Classified Salary	5,398,073	108,551	2%	5,506,624	73,975	1%	5,580,599	361,559	6%	5,942,158	134,137	2%	6,076,295	
Wages or Hourly Salary	107,190	86,123	80%	193,313	72,968	38%	266,281	5,719	2%	272,000	-	0%	272,000	
Benefits	1,881,804	39,038	2%	1,920,842	40,438	2%	1,961,280	47,300	2%	2,008,580	44,206	2%	2,052,786	
(H) Total Direct Personnel Expenses	\$ 7,397,208	\$ 234,821	3%	\$ 7,632,029	\$ 202,856	3%	\$ 7,834,885	411,033	5%	\$ 8,245,918	\$ 178,806	2%	\$ 8,424,724	
Direct Non-Personnel Expenses														
Non-Personnel Expenses (Insert Additional Lines as needed)	FY 2021 Actuals	\$ Change	% Change	FY 2022 Actuals	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	\$ Change	% Change	FY 2025 Projection	Assumptions
M&O Budget	1,226,721	117,710	10%	1,344,431	289,775	22%	1,634,206	(203,701)	-12%	1,430,505	202,132	14%	1,632,637	
Library Materials Expenditures	4,448,976	(312,736)	-7%	4,136,240	(638,348)	-15%	3,497,892	981,853	28%	4,479,745	44,797	1%	4,524,542	
UT System Direct Funding for Materials	1,390,938	-	0%	1,390,938	937,499	67%	2,328,437	(937,499)	-40%	1,390,938	-	0%	1,390,938	FY24 & FY25 return to usual rate
Grant Expenditures	161,914	(161,914)	-100%	-	240,442	-	240,442	(240,442)	-100%	-	-	-	-	
Other Transfers Out - Library Security	63,000	-	0%	63,000	-	0%	63,000	-	0%	63,000	-	0%	63,000	
(I) Total Direct Non-Personnel Expenses	\$ 7,291,549	\$ (356,940)	-5%	\$ 6,934,609	\$ 829,368	12%	\$ 7,763,977	\$ (399,789)	-5%	\$ 7,364,188	\$ 246,929	3%	\$ 7,611,117	
Total Unit Expenses (Including Support Unit Expense Allocation)														
	FY 2021 Actuals	\$ Change	% Change	FY 2022 Actuals	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	\$ Change	% Change	FY 2025 Projection	Assumptions
(J) Total Unit Expenses and Support Unit Expense Allocation (G+H+I)	\$ 14,688,757	\$ (122,119)	-1%	\$ 14,566,638	\$ 1,032,224	7%	\$ 15,598,862	\$ 11,244	0%	\$ 15,610,106	\$ 425,735	3%	\$ 16,035,841	
Operating Margin														
	FY 2021 Actuals	\$ Change	% Change	FY 2022 Actuals	\$ Change	% Change	FY 2023 Projection	\$ Change	% Change	FY 2024 Projection	\$ Change	% Change	FY 2025 Projection	Assumptions
(K) Total Operating Margin (F-J)	\$ 1,505,073	\$ (12,681)	-1%	\$ 1,492,392	\$ (727,030)	-49%	\$ 765,362	\$ (312,982)	-41%	\$ 452,380	\$ (163,728)	-36%	\$ 288,652	

Operating Margin FY23: Based on actuals-to-date plus projection for remainder of FY. Anticipate some salary & wages savings against fee plus endowment savings, until UTC AVP hire. A 2% savings is planned for reserves capital projects.

Operational Review Packet

Name of Unit: UTSA Libraries and Museums

College / Division: VPAA

Contact Name: Dean Hendrix, Vice Provost and University Librarian

Phone/Email: dean.hendrix@utsa.edu 210.328.9195

Type of Unit:

Academic Support Unit

Auxiliary Unit

Administrative Support Unit

REQUIRED DOCUMENTS:

FIRST SUBMITTAL -

General Information to "Tell Your Story"

Explain "who you are", "what you do", "how you do it", and "how it aligns to the destination & strategic initiatives."

Organizational Chart and Position Data

Provide snapshot of functional organization chart with FTE information; identify potential or planned staffing or organization changes

SECOND SUBMITTAL -

Challenges / Opportunities

Explain critical issues and identify potential opportunities and efficiencies; discuss benefits to students and campus

Key Performance Indicators / Benchmarks / Comparisons

Provide operational and efficiency metrics along with benchmarks or comparisons; Explain service delivery model framework, including service expectations and aspirations

Budget / Actual Financial Data

5-Year Proforma; Provide actuals for prior 2 years, current year projection, and 2 additional future year projections [Note: Template will be provided]

Explanation of Reserves

Provide details of current balances and practice of adding to reserves each year; Provide 3 years of prior growth and current projection.

Supplemental Information (Optional) :

Customer Surveys	<input checked="" type="checkbox"/>	Summary of current year results, along with changes over time
External Review Data	<input type="checkbox"/>	Summary of results from an external source, such as related to accreditation/assessment
Trending Data	<input type="checkbox"/>	Trend data showing how an operation has changed over time, explaining conclusions

Describe Any Additional Information Provided (Optional) :

Routing and Approvals:

Unit Director / AVP Signature: 
Printed Name: DEAN HENDRIX

Date: APRIL 4, 2023

Dean / VP Approval Signature: _____
Printed Name: _____

Date: _____

* Include this cover sheet with the packet submitted to Operational Review Governance Committee