Slicing the Pie: A Discussion of Seminary
Book Budget Allocation at Andrews University
by
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Introduction

One of my principle responsibilities is collection development. I thoroughly enjoy this task. Tucked away underneath all the proper professional reasons for this pleasure, such as the intellectual engagement with a broad variety of literature, the sense of accomplishment in building a lasting testimony to religious literature, etc., there is a simple joy in spending money. And the more money I can spend to build this wonderful collection, the happier I am. My ecstasy would know no bounds if only funds were available in an infinite amount. But the budgeting and allocation process keeps my feet planted firmly on the ground.

My wife and I spent last month in France, and we had the privilege of visiting a number of relatives, mostly from her parents' generation. And each visit centered around a table. The meals invariably consisted of several courses, and we were urged to eat, eat, eat, and then eat some more. Each course could have been a meal in itself. And so we spent hours around the table and managed to consume incredible amounts of food. How I wish I could serve up book orders the way we were served dinner and find myself urging the acquisitions department to order, order, and then order some more. But budgets and allocations define the task quite differently. Much of the literature on collection development budgeting and allocation is responding much more to enforced dieting than to feasting.

Budget allocation is like slicing a pie at a picnic. If there is plenty to go around, everybody is satisfied, perhaps even feeling stuffed, and there is little fuss about the size of any given piece. But change the scenario. There is only one small pie, and everybody at the picnic is hungry. How that pie is sliced becomes a major political issue.

Library materials budgets can be like that pie. While there is plenty of money to go around, it is not much of an issue as to how the money is allocated. And since the collection development officer is the one who holds the knife, it is a quite pleasant task when everyone gets as much as they want. But the task takes on a different tenor when it becomes necessary to focus on trying to see that each gets a fair share because there is not enough to go around.

For many years, there seemed to be a more than adequate materials budget at Andrews University, at least up through the turn of the century. At the time of the last accreditation visit of the Association of Theological Schools (ATS) in 1999, library support was deemed acceptable. But after that the pie shrunk in size. A new paradigm for communicating needs and managing limited resources was called for. As Donna Packer notes, "The literature of acquisitions allocations continues to grow. It is clear there is no single correct answer to the problem of how best to allocate acquisitions funds. Each library must try to find the answer that appears to provide the best support for its varied clientele and still be politically acceptable to

the majority of its constituents."[1] This paper describes an effort we made to "provide the best support" in a "politically acceptable" way.

Background Information

Andrews University is a private educational institution operated by the Seventh-day Adventist Church (SDA). It is one of eleven SDA colleges and universities in North America. Andrews University has the distinction of being the oldest, founded in Battle Creek, Michigan, in 1874 as Battle Creek College. The campus moved to Berrien Springs in 1901 and was renamed as Emmanual Missionary College.

The Seventh-day Adventist Theological Seminary (SDATS) has its roots in an Advanced Bible Institute first run as a summer program for Bible teachers in 1934. Shortly thereafter, a seminary campus was established in Washington, D.C. Then, in 1957, a School of Graduate Studies was formed, and, together with the SDATS, became Potomac University. The intention was that the new university would affiliate with a currently existing undergraduate college, and because the campus of Emmanual Missionary College had room to grow, Potomac University affiliated with it to form Andrews University in 1960.

The SDATS is one of several schools that make up Andrews University, which include the College of Arts and Sciences, School of Education, School of Business, and the College of Technology. It is the official SDA seminary for North America. Enrollment for the 2004–2005 school stood at 401 in the Master of Divinity program, at 121 for the various master's programs, and 289 for the Doctor of Ministry program.

The collections of the three schools were merged into the James White Library. Initially, the SDATS library was kept as a special collection in its own physical area. The materials brought to Andrews University from the SDATS in Washington, D.C., were kept distinct in the records, and all new acquisitions for the SDATS were also tagged. With the expansion of the physical building in the early 1970s, the materials themselves were integrated into the larger collection, but the records still identified which items belonged to the seminary collection. Thus the seminary collection is an identifiable collection, although it is shelved by LC class within the full collection. It is known as the "Seminary Library." Because most of the Seminary Library collection is located in the LC classification B–BX, and because this LC range is located in one general area on the same floor together with a Seminary Reference Area and seminary periodicals, that physical space is also known as the Seminary Library.

Andrews University also has the distinction of being one of three doctoral degree-granting SDA institutions in North America. Loma Linda University in California has a strong medical program; La Sierra University, also in California, has a doctoral program in education; and Andrews University offers doctorate degrees in the School of Education and the SDATS. The Ph.D. programs offered by the SDATS continue to be flagship programs within the global denominational education system.

In 1974, the SDATS began offering the Th.D., and, shortly thereafter, the Ph.D. The first dissertation to be completed was by a Joel Awoniyi on manuscript relationships in the book of James. I had the privilege of working as a graduate assistant in helping with the collations of the Greek manuscripts he used. Since then 119 Ph.D. dissertations have been completed. Enrollment in the Ph.D. program for the 2004–2005 school year was 91.

The need for additional resources to support the doctoral program was recognized early, and the General Conference of the SDA Church provided a generous subsidy for books. For many years, this subsidy, together with reasonable revenues from tuition, supported collection development for the Seminary Library at an acceptable, if not above-average, level.

While the Seminary Library has consistently received a reasonable percentage of the James White Library book budget, the best way to divide up the seminary allocation has always been a question for debate. The basic premise has been that each department would receive the same amount. This was obviously a political solution. The seminary is organized into six departments: Christian Ministry, Church History, New Testament, Old Testament, Theology and Christian Philosophy, and World Missions. At one point, the entire allocation was divided up equally among the departments. However, in 1999, we began using a percentage formula in which each department was allocated 8%. The balance was divided up between General, Indexes, several areas of special interest, and special projects. This "formula" was arrived at by consensus of the Seminary Library Committee and did not take any objective measures into consideration. It was called a formula because it could be calculated from one year to the next by simply plugging in the bottom line figure.

With this background in mind, this paper will focus exclusively on that portion of the book budget supporting the SDATS and how it was allocated to serve the needs of the various programs.

The Seminary Library

The insistence on each department receiving the same amount has shaped the collection in certain ways. Actual academic publishing output does not reflect this equal division of subject areas, so proportionally there is a collection bias towards those areas with the lesser publishing output.

To illustrate this bias, let me report on some findings on the 2003 publishing year. As a matter of routine, I enter some basic information on titles I come across in vendor slips, catalogs, WorldCat searches, etc., into a Microsoft Access database. By doing this, I can prepare orders and have a reasonable estimate of the cost of what I am ordering. I also do not have to make negative decisions about titles more than once. A nice by-product of the database has been the ability to prepare a variety of analyses and reports that have made good discussion points, such as relevant publishing output. The ISBN is used as the key to avoid duplication. Each title is assigned an LC call number. Based on a profile using the LC call numbers, each title is further assigned a Collection Level: 1—Basic; 2—Comprehensive; or

3—Exhaustive. Finally, each title is assigned a code for a general subject area: Missions, Theology, Old Testament, New Testament, Ministry, and Church History, based on my perception as to who might be most interested in the title. To assess publishing output in each area, I used only titles listed at a level two or level three and sorted them by general subject area. For 2003, the number of titles that met the above criteria came to 2,784. What I found was that relatively speaking, there are substantially more books published in systematic theology and church history (45%) than in biblical studies (23%). An even greater disparity is evident when comparing books published in Practical Theology (27%) and World Missions (8%). See Chart I. Yet when this concern was discussed with the Seminary Library Committee, it was not an issue they wished to act upon. The end result is that the James White Library has a relatively more complete collection of Biblical Studies over against Theology, and a relatively more complete collection in World Missions than in Christian Ministry. Is this disparity such a bad thing? Politically it may not be, given the global organization of the denomination and its historical emphasis on the Bible.

Additional support for maintaining the emphasis in Biblical Studies (BS) and Practical Theology (BV) can be deduced from proportional use statistics. Again these two areas demonstrate a relatively higher usage rate than the other areas.[2]

For marketing purposes, a comparison of holdings in specific subjects was made with notable benchmark-worthy libraries using OCLC WorldCat.[3] It was found that in the subject headings of "Sabbath," "Second Advent," "Creationism," "Bible and Science," the specific biblical books of Daniel and Revelation, and the "Millerite Movement," the James White Library had the largest holdings among the benchmark libraries. Though we may not have the largest holdings, we do compare favorably in Biblical Archaeology, Youth Ministry, Preaching, and related Practical Theology topics. When conversing with church administers, potential students, and potential donors, this kind of information is impressive and will hopefully generate additional support.

One other highlight in considering the Seminary Library involves usage by the campus. A recent survey of items checked out by patron type revealed that 70% of items checked out by graduate students, any level, any school, were items from the seminary collection. Of all items checked out by faculty, 58% came from the seminary collection, and for items from the regular stacks, 64% of materials checked out by all users came from the seminary collection. As a special collection, the seminary collection is proportionately well used and serves the entire campus.

Recent Budgets

In 2002, because of a wide variety of factors, Andrews University experienced what the university president, Niels Erik Andreasen, has termed a financial "hiccup, well perhaps a little more than a hiccup."[4] During that year the book portion of the seminary materials budget was cut by about 20%. We appreciated that the periodicals and electronic access portions of the Seminary Library budget were not affected.

This cut in the allocation challenged the budget formula by reducing the individual department dollars significantly. One consequence involved standing orders. The two Biblical Studies departments found that most of their reduced allocation was now eaten up by standing orders, with very limited discretionary funds left over. In response to this frustration, these departments received upwardly modified amounts so that in spite of standing orders, there were always some discretionary funds. This adjustment was the first in a series of attempts to mitigate the financial impact of the reduced budget.

The next development in the budget evolution was inspired by a special strategic planning session sponsored by the seminary administration in March 2003. In a quiet retreat center, the faculty worked through various steps in formulating a strategic plan. One step involved dividing into small groups to discuss their vision of the future of the seminary. The groups were defined by programs, not departments. I found myself participating in the group focusing on the Ph.D. programs. For this group, the library was considered especially important and highly valued. The perception that we had a "good" library was not challenged, while concerns for the future were expressed.

The entire two-day exercise was shaped to encourage thinking "outside the box." And so in the spirit of the occasion, that is what I began doing. Given a reduction in financial resources, how could the library continue to provide appropriate targeted support to the Ph.D. program?

The Seminary Library Solution

The initial premise that motivated this most recent discussion of the budget allocation was that the individual Ph.D. student depended more heavily on the library collection than the individual professional degree student. This may seem obvious, but upon further reflection, in the practice of the actual selection of materials this principle had not been adequately taken into account.

An emphasis on "usage," rather than the "user," had been the *de facto* selection paradigm. This was significant because of the overall greater number of students in the professional degree programs. Thus selection choices were more often made based on potential usage rather than on the potential user. For example, if a choice had to be made between a new, light, academic biography of Martin Luther in English and an original research-level monograph in German, the English title was usually selected. The assumption was that many more M.Div. students would eventually use the biography but that only an occasional Ph.D. student would ever need the monograph, and even then, only maybe. However, this new emphasis on doctoral-level research defends the alternative choice by considering that the German-language monograph would provide new information and cutting-edge research, the type of material critical for doctoral-level scholarship. The selection could be further justified in noting that the library already has a good representation of biographies of Martin Luther, that the new biography would have relatively little new information, and that current holdings would continue to be adequate for the general assignments in the professional-oriented coursework.

The need for this type of user-targeted support is further supported by a survey of library materials expenditures by members of ATS as reported in the *ATLA Proceedings*, 2001. Seminaries were categorized first by whether or not they offered a Ph.D. Then for those with professional degrees only, we looked at schools that had between 100 and 600 students. We also did not use figures that seemed to be calculated differently than what we do at Andrews University. For example, some integrated libraries appear to report the entire materials expenditures for the campus, not just that portion directly supporting the seminary. Of the twenty-four schools we identified that offered the Ph.D. program, the average materials expenditure was just over $200,000. For midsize schools offering only professional degrees, materials expenditures averaged about $80,000. Based on this data, we concluded that offering a Ph.D. implied substantially enriched library support and that the library could best mitigate below-average support by intentionally targeting the needs of the Ph.D. students. An updated summary of library expenditures based on the information in the *ATLA Proceedings*, 2004, is presented in Tables I and II.

Thus, within the context of "strategic planning," a proposal was prepared to allocate the materials budgets to programs rather than departments, expressed in percentages of the total book allocation. It suggested that 50% of the budget go for Ph.D. library support. The proposal was reviewed by the Dean's Council. They supported it and referred it to the Ph.D. committee, who added their support and referred it to the full Faculty meeting. After some good discussion, the proposal was accepted and referred to the Seminary Library Committee for implementation. The Seminary Library Committee prepared the budget for the 2003–2004 fiscal year.

Admittedly, the basic principle that each "specialization" receives approximately the same amount still predominated in the new budget. Modest adjustments were made to accommodate standing orders as well as academic publishing output. But even these were not rigorously applied, and none of the other typical factors used in allocation formulas were used at all. Again, the end product was politically acceptable within broadly stated objectives.

In any case, such factors as the number of faculty approved to supervise dissertations within a specialization or the number of students writing in each specialization are not relevant. Just by virtue of offering a specialization, a literature base is assumed regardless of how many faculty or students are involved. For example, the Old Testament specialization may involve seven faculty and twenty-five students, while the World Missions specialization has three faculty and five students, yet the five students in World Missions have need of a literature base just as much as the Old Testament students.

The percentage breakdown of the budget is found in Table III, comparing it with the previous year. It will be noted that the redistribution has favored Biblical Studies at the expense of Church History and Missions. The main reason for this is that we currently have more standing orders in Biblical Studies than in the other areas, and it was felt that these specializations needed some discretionary funds. The lower numbers for Adventist Studies and Missions were influenced by academic publishing output in those two areas.

The political ramifications of the change have been minimal, largely because changes have not been that dramatic in real dollars. For example, even though Christian Ministry no longer falls under the heading of Academic, the new breakdown added one percent to their fund line. While selection of the materials is the responsibility of the librarian, we have also made an extra effort to honor faculty requests, and so from the individual faculty's perspective, we are still meeting their needs.

The actual implementation of the budget has had its own challenges. First, to facilitate the paradigm shift, we simply adapted the current fund lines by redefining them. What were once department fund lines became comparable program fund lines. This worked out fine because each department except for Christian Ministry offered a specialization in the Ph.D. program. A couple of fund lines were added to cover general or professional-level materials in academic areas.

However, this also meant that items encumbered under the previous paradigm would show up in the new fiscal year, so there were some carry-forward inconsistencies. Another problem area involved the standing orders. Some standing orders were for materials that do not necessarily support a Ph.D. specialization. We reviewed all the standing orders and reassigned fund numbers as needed.

The one department most directly affected was the Church History department. For the master's level and professional programs, they provide survey courses that cover the full spectrum of church history, from the early church through the present. However, the Ph.D. specialization they offer is limited to Adventist Studies. When compared to the full scope of church history, relatively little research-level literature is published that specifically supports this very narrow specialization. Thus, if the specialization were to receive a comparable amount to the other specializations and the scope of selection were to be rigorously applied, it would be relatively over funded. Conversely, if the only library support for the general Church History curriculum were to be limited to non-research-level materials, it would leave substantial holes in the collection. Thus research-level materials are purchased using Ph.D. program funds from the broader discipline, especially early Protestant church history and American church history, as well as from cognate areas of historical theology and church and state studies. The discussion of what should be included is an ongoing dialogue.

Conceptually, the program model has merit and seems to be politically acceptable in the SDATS. But putting it into practice, making the actual selection decisions and assigning each title to a fund line, is not that simple. For North American publishers, it is relatively easy to determine the primary market for any title, whether popular, professional, or academic. Within the academic category, the distinction between the introductory works and the highly specialized monographs is clear enough, but the majority of titles fall somewhere in between. Even doctoral students, in their use of sources, do not discriminate that categorically. International non-English titles present a different set of problems; with fewer clues as to intended audience or academic level available. The net result is that the gray area between what would be clearly doctoral level and what would be obviously master's level is wide. If it were possible to carefully read each book before acquiring it, over time it might be possible to draw a nice clean line. But that

is not practical. Thus, based on available information, for books in this gray area, we are left with simply being pragmatic; we use whichever fund line has the money available.

The most recent step in refining this process has involved the addition of departmental Collection Development Policies to the general Resource Development Policy of the SDATS. These pages summarize the curriculum and specializations of the department, state collection goals at both the master's level and doctoral level, giving some direction as to which categories of books should be included, and then finally which fund lines the department "participates" in. This language was chosen to convey that the department does not "own" the fund line as it "sort of" did in the prior budgets, but that the program does, and as professors who each students in the various programs, they represent the program.
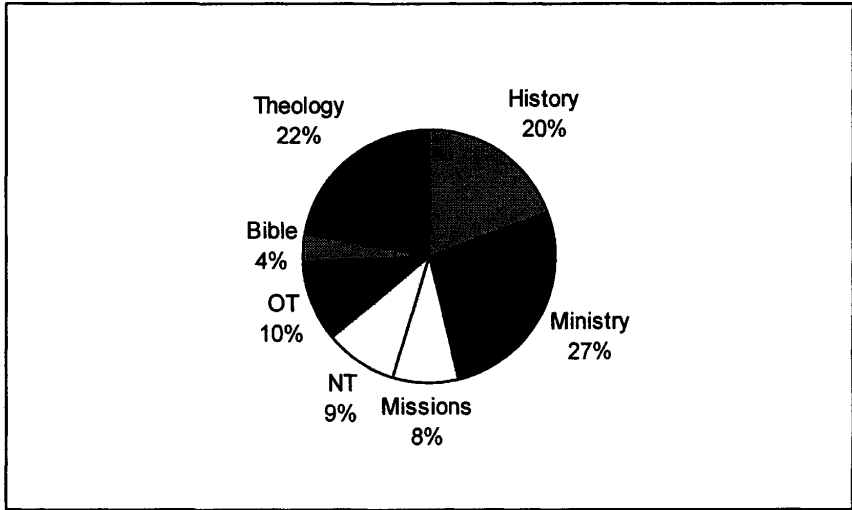
Evaluation and Conclusion

That is the story, now for the evaluation. The first year in which the program paradigm was used turned out to be a transition year in that encumbered funds from the previous year needed to be absorbed. We are just completing the second year. The empirical data that would be helpful in evaluating the change in collection statistics simply has not had time to accumulate. However, the process through which this paradigm was adopted, the data used to support the change, and the initial feedback from the faculty and students on an anecdotal level all suggest that a valuable learning experience has taken place. The mission of the Seminary Library has been clarified, the vision of what the library should become has been sharpened, and proposals for carrying forward the Seminary Library have been buttressed. The information collected has also enriched tools for marketing both the seminary and the library. And last but not least, this information has provided valuable, credible data that improves our ability to compete on campus for available funds.

There is one related concern. Throughout the process of restoring the university budget to a state of good health, benchmarking has been one of the key strategies for adjusting expectations. It has been particularly interesting to listen as various benchmarking figures are cited to justify cuts. In the case of the library, cuts have been proposed in most areas of the budget, from personnel to wages to books to services to plans for space management. While the pressures the university financial management team is under are appreciated, it would be hoped that when benchmarking indicates the opposite of cuts, that further investment is needed, that those points would receive the same attention. While we can today with reasonable confidence claim that the Seminary Library is serving the SDATS well, we also need to make clear that, should inadequate funding continue, it will not be long before such claims would be misleading.

Until the pie once again becomes so large that regardless of how the pie is sliced everybody feels well fed, slicing that pie will continue to be a potentially challenging political issue. Well-informed, intentional collection development

budgeting and clearly stated goals, applied with accountability, can make the best of a less than ideal situation.

Chart I: Relative Academic Publishing, 2003

Table I: Seminaries with Professional Degrees Only
Library Expenditures

	Institution	*Students*	*Expenditures*
1	Pittsburg Theological Seminary	245	$224,381
2	Weston Jesuit School of Theology	267	$192,365
3	Tyndale University College and Seminary	375	$191,221
4	McCormick Theological Seminary	524	$170,934
5	Regent University School of Divinity	314	$166,929
6	Bethel Seminary of Bethel University	749	$146,838
7	Wesley Theological Seminary	402	$141,613
8	Seventh-day Adventist Theological Seminary of Andrews University	426	$132,125
9	Gordon-Conwell Theological Seminary	966	$127,443
10	Golden Gate Baptist Theological Seminary	504	$125,434
11	Nazarene Theological Seminary	237	$114,954
12	University of St. Mary of the Lake Mundelein Seminary	233	$112,848
13	Ashland Theological Seminary	606	$106,711

14	Regent College	338	$103,232
15	Denver Seminary	368	$92,832
16	Columbia Biblical Seminary	336	$86,510
17	Catholic Theological Union	257	$86,392
18	University of St Thomas School of Theology	242	$74,831
19	Assemblies of God Theological Seminary	346	$73,911
20	Athenaeum of Ohio	227	$71,919
21	Eastern Baptist Theological Seminary	253	$69,363
22	Providence Theological Seminary	202	$68,828
23	Midwestern Baptist Theological Seminary	240	$67,087
24	Covenant Theological Seminary	442	$64,872
25	Oral Roberts University School of Theology	271	$55,537
26	Alliance Theological Seminary	259	$54,430
27	Biblical Theological Seminary	235	$36,840
28	Western Seminary	303	$30,519
	Average Library Expenditures		$103,596

Professional degrees include the M.Div., D.Min., and all other master's-level degrees. For the seminaries listed in this table, the Association of Theological Schools website (www.ats.edu, accessed 8 June 2005) listed only professional degrees. The number of students and library expenditures are taken from the *Summary of Proceedings: 58th Annual Conference of the American Theological Library Association, Kansas City, MO, June 16–19, 2004* (Chicago: ATLA, 2004), 272–285. Only schools with between 200 and 1,000 students are listed.

Table II: Seminaries with Academic Doctorate Degrees
Library Expenditure

	Institution	Students	Expenditures
1	Candler School of Theology at Emory University	642	$468,619
2	Graduate Theological Union	1322	$401,178
3	Trinity Evangelical Divinity School of Trinity International University	814	$373,549
4	Harvard University Divinity School	417	$366,266
5	Southern Baptist Theological Seminary	1145	$303,466
6	Union Theological Seminary and Presbyterian School of Christian Education	1222	$265,815
7	Asbury Theological Seminary	1005	$263,778
8	New Orleans Baptist Theological Seminary	932	$255,850
9	Fuller Theological Seminary	2079	$246,754
10	Southeastern Baptist Theological Seminary	866	$241,305
11	Columbia Theological Seminary	280	$240,559
12	Southwestern Baptist Theological Seminary	459	$228,245
13	Dallas Theological Seminary	984	$222,263
14	Union Theological Seminary	218	$217,487
15	Concordia Seminary (MO)	569	$202,358
16	Boston University School of Theology	233	$193,185
17	Luther Seminary	546	$188,663
18	Catholic University School of Theology and Religious Studies	109	$161,849
19	Garrett-Evangelical Theological Seminary	375	$155,848
20	Westminster Theological Seminary	456	$146,794
21	Reformed Theological Seminary	478	$143,590
22	Iliff School of Theology	256	$133,299
23	University of St. Michael's College Faculty of Theology	97	$132,242
24	Seventh-day Adventist Theological Seminary of Andrews University	426	$132,125
25	Brite Divinity School of Texas Christian University	212	$123,275
26	Concordia Theological Seminary (IN)	344	$115,836
27	General Theological Seminary	160	$111,435
28	Claremont School of Theology	380	$105,010
	Average Library Expenditures		$219,309

Academic doctorate degrees include the Th.D. and the Ph.D. For the seminaries listed in this table, the Association of Theological Schools website

(www.ats.edu, accessed 8 June 2005) listed these degrees. The number of students and library expenditures are taken from the *Summary of Proceedings, 2004*, 272–285.

Table III: **Seminary Book Budget Percentage Formula**

	2004	*2002*	*Difference*
General	10.0%	10.0%	0.0%
Professional (M.Div., M.A., D.Min.)	15.0%		
Christian Ministry	9.0%	8.0%	1.0%
Bible	3.0%	5.0%	-2.0%
Theology/Church History	3.0%		new
Academic (Ph.D., M.A.)	50.0%		
Old Testament	15.0%	8.0%	7.0%
New Testament	11.0%	8.0%	3.0%
Theology	12.5%	8.0%	4.5%
Adventist Studies	2.5%	8.0%	-5.5%
Missions	5.0%	8.0%	-3.0%
Religious Education	4.0%		new
Focused Strengths	15.0%		
19th Century American Religion	4.5%	5.0%	-0.5%
Archaeology	6.0%	5.0%	1.0%
Religion and Science	1.5%		new
Apocalyptic	1.5%		new
Seventh-day Adventist Topics	1.5%		new
Projects	10.0%	10.0%	0.0%

Note that the percentage figures for 2002 do not add up to 100%. A couple of fund lines were discontinued after 2002.

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1 Donna Packer, "Acquisitions Allocations: Fairness, Equity and Bundled Pricing," portal: Libraries and the Academy 1, no. 3.(2001): 209.
2 Dennis Carrigan, "Improving Return Investment: A Proposal for Allocating," Journal of Academic Librarianship 18, no. 5 (1992): 291–298.
3 The libraries used for this comparison were Princeton University, Harvard University, Asbury Theological Seminary, Southern Baptist Theological Seminary, Fuller Theological Seminary, Graduate Theological Union, and University of Notre Dame.
4 Stated in a report to the faculty and staff concerning the Board of Trustees meeting, March 7, 2005.

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