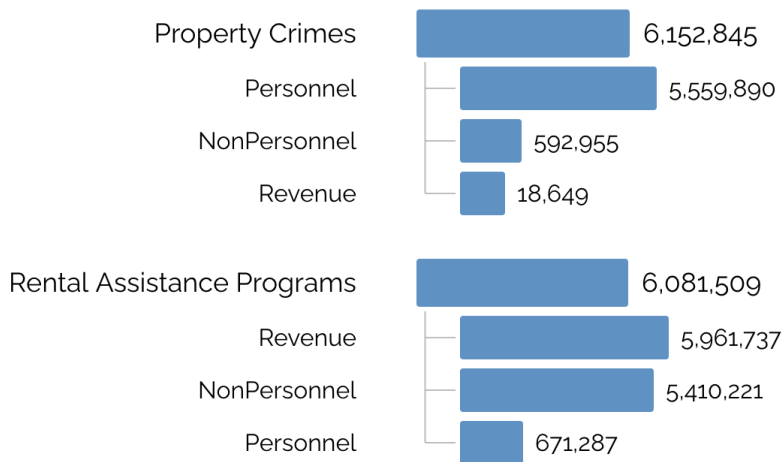


COST ALLOCATION

SHAPE YOUR STORY

THREE TYPES OF COST ALLOCATIONS

Personnel, non-personnel operating costs, and program revenue are allocated to a program to better understand the total cost and cost recovery components of a program.



ALLOCATE BY PERCENTAGE

Personnel costs are allocated by a percentage of time. Non-personnel and revenue can be allocated by a percentage of dollars.

SPREAD COSTS PROPORTIONALLY

Some costs can be shared proportionally, based on how staff supports programs. This is done by allocating costs by FTE.

ALLOCATE EVENLY

When allocating personnel, non-personnel and revenue, time and dollars can be allocated evenly to supported programs.

SHAPE YOUR STORY

Costs are allocated to understand how operating expenses and staff support programs.

Allocate time to a program, if staff spends at least 5% of their time supporting a program.

Allocate non-personnel, and program revenue to programs directly when possible.

VALIDATE YOUR COSTS

With the support of Super Users, Department Users should review allocations at the cost and program levels for reasonability.

Toggle to view costs by programs, allows for the opportunity to view the total costs allocated to a program.

COST ALLOCATION

SHAPE YOUR STORY

Selected	Current Allocation	Cost	Object	Object Number	Account
<input checked="" type="checkbox"/>	100.00	17,000	Contracts Services	101-4505-450.32-07	101-4505-450.32-07

Total Amount Allocated: \$17,000.00 of \$17,000.00 (100%)

Update Expense or Revenue Allocations. Check Programs to include, then select an allocation method.

Programs to Include: Check All Uncheck All

Allocations Methods:

Use saved programs

Include additional programs

Additional User Groups: Additional Department: Filter by Division:

Include	UserGroup	Department	Division	Allocated Cost	Program	FTE	ProgNum	Pro
<input checked="" type="checkbox"/>	Library and Information Services	Library and Information Services	none	0	Adult Programs	19	268	286
<input checked="" type="checkbox"/>	Library and Information Services	Library and Information Services	none	0	Children's Programs	0.975	270	287
<input checked="" type="checkbox"/>	Library and Information Services	Library and Information Services	none	17000	Circulation Services	10.471	291	292
<input checked="" type="checkbox"/>	Library and Information Services	Library and Information Services	none	0	Collection Development and Maintenance	10.229	261	285
<input checked="" type="checkbox"/>	Library and Information Services	Library and Information Services	none	0	Family Programs	1.225	273	288
<input checked="" type="checkbox"/>	Library and Information Services	Library and Information Services	none	0	Reference Services	3.7	278	290
<input checked="" type="checkbox"/>	Library and Information Services	Library and Information Services	none	0	Technology Services and Support	3.92	287	291
<input checked="" type="checkbox"/>	Library and Information Services	Library and Information Services	none	0	Teen Programs	0.65	276	289

TIPS & TRICKS



Use the chart stack feature to change how the data is organized.



Download a summary of allocations for easier review and analysis.

Include additional programs

Additional User Groups:
Allocate time to programs in other user groups.

Use saved programs

Save a group of programs for quicker allocation.

1

ALLOCATE COSTS

Allocate personnel first, then non-personnel and revenue.

2

VALIDATE COSTS

Review costs for accuracy and reasonability.

3

ADD INSIGHTS

Tag programs under the costing-lens.