

November 19, 2019

Sent via email: Teri.Balser@dal.ca

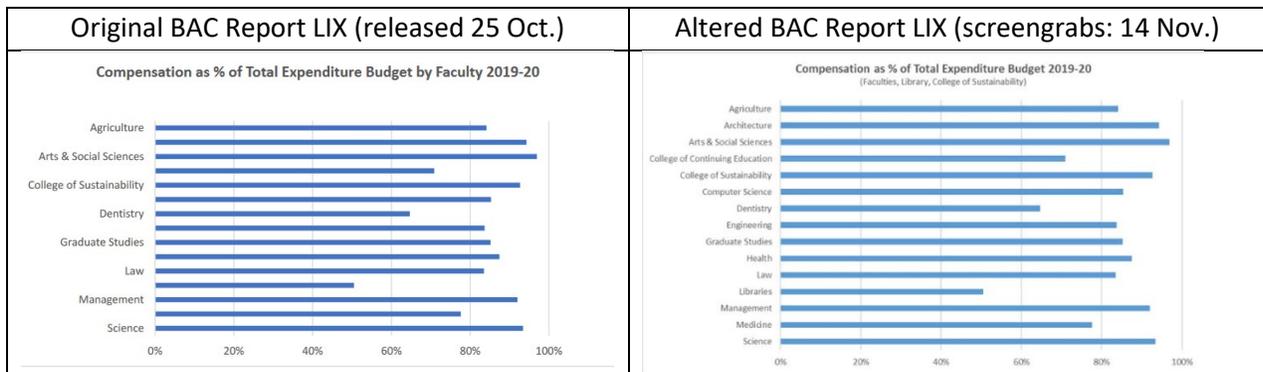
Dr. Teri Balser
Interim President & Vice-Chancellor
Dalhousie University

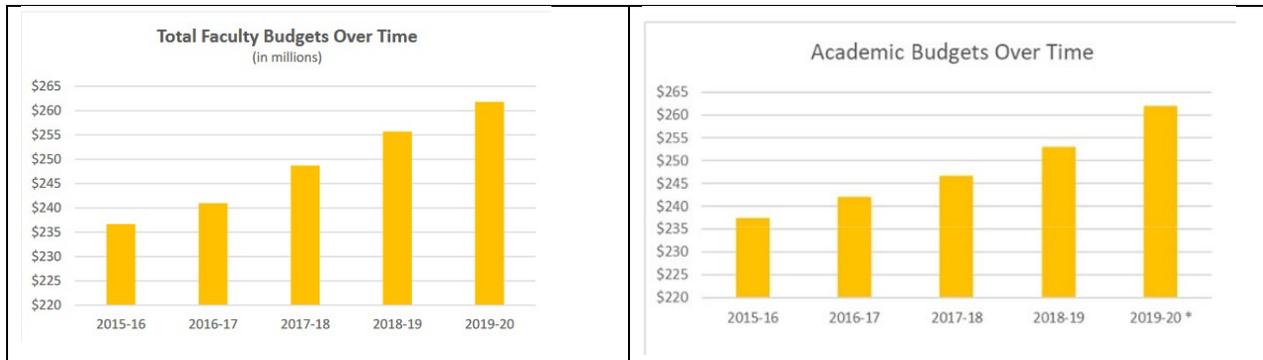
Dear Teri,

Thank you for your reply to [my letter](#) raising concerns about the accuracy of BAC Report LIX. I appreciate as well the changes that have been made subsequently to BAC Report LIX but, as I indicate below, significant concerns remain about the accuracy of the budget information being provided as “Context” for the university community’s responses to BAC deliberations.

I had calculated a loss to Faculty budgets of \$6m based on comparing page 18 in each of two Annual Financial Reports (2015-16 and 2018-19), and you explained that the later Report did not include endowments on page 18 whereas the earlier one did. I should therefore have compared page 18 in 2015-16 to page 11 in 2018-19, which shows, you suggest, a \$16m increase. I appreciate the clarification on endowments, but we are still comparing apples and oranges: the \$16m increase is in total Academic budgets, but the chart I was questioning explicitly referred only to “Faculty Budgets.” Moreover, that BAC chart showed a \$19m increase—which does not match the \$16m figure to which your letter points.

The \$16m figure does, however, agree with [the revised BAC Report LIX](#) that was posted at some point (the filename was changed too, with “Budget Advisory Committee Report” becoming “BAC Report”—the [link](#) in the Survey does not, at time of writing, work):





It isn't entirely clear how much has been changed, but I very much appreciate the corrections BAC has made to the above graphs that were questioned in my letter: the chart with the fifteen blue lines is now clearly titled to indicate that it includes a range of units, not just Faculties, and all of the lines are now labelled; the chart on Faculty Budgets is now retitled to indicate that it refers to a wide range of Academic budgets, and the bar for 2018-19 has been reduced to match the data on the page 11 that you referenced in your response (from about \$256m in the original report to about \$253m now, matching the figure of \$252,818,000 on page 11 in the 2018-19 Annual Financial Report and the increase of \$16m you note in your letter).

While appreciated, these changes do, however, reinforce **continuing concern about the accuracy of BAC Report LIX and therefore its credibility and utility** as a founding document for this year's discussions of the budget and the academic mission. The retitling reflects what we suspected might be the case—that these were not Faculty budgets, but a large group of Academic budgets. As I noted in my letter, this group includes “the Libraries, Sustainability, a Co-Op office, Academic initiatives, and so forth” (3)—even benefits negotiated in Collective Bargaining.

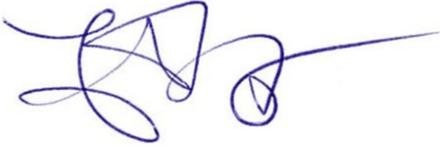
This might seem like quibbling given the size of Dalhousie's budget, but our fundamental concern here is the presence of inaccuracies in an important Report that is supposed to provide an evidentiary basis for collegial discussions that are vitally important to the academic mission. BAC Report LIX claims, “This context paper is intended to provide information on factors that influence the University budget so that students, faculty, staff and other stakeholders can contribute to the dialogue in an informed way” (p. 1). So, as a point of information, **how often are BAC Reports changed after they're first released?** And, of immediate importance, **are there any other errors in BAC Report LIX?**

The proliferation of Reports with the same title and number also compounds members' concerns with the survey's methodology, which I've already mentioned to you. BAC Report LIX is referenced on the first page of that survey as “context.” Some respondents had access to the original BAC Report LIX with errors, some would find a broken link if they tried at a later date (and perhaps even gave up on completing the survey for that reason), and some may have found the revised BAC Report LIX.

We look forward to hearing your thoughts on the above, as we try to work towards a meaningful collegial process—based on clear, accurate, and credible evidence—on the university budget

and so the academic mission to which we are all so deeply committed. As always, I would be happy to meet to discuss DFA concerns.

Sincerely,

A handwritten signature in blue ink, appearing to read 'J. Wright', with a long horizontal line extending to the right.

Julia M. Wright, PhD, FRSC
DFA President

Cc: Candace Thomas, Chair, Board of Governors
Ian Nason, VP Finance
Aisha Abawajy, DSU President
Kevin Hewitt, Chair, Senate and SPGC