

# Guide to the Budget Office, Yale University, Records

RU 718



compiled by Daniel Hartwig

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Yale University Library  
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<http://www.library.yale.edu/mssa/>

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## Collection Overview

**REPOSITORY:** Manuscripts and Archives  
Yale University Library  
P.O. Box 208240  
New Haven, CT 06520-8240  
(203) 432-1735  
(203) 432-7441  
beinecke.library@yale.edu  
<http://www.library.yale.edu/mssa/>

**CALL NUMBER:** RU 718

**CREATOR:** Yale University. Office of Finance and Administration

**TITLE:** Budget Office, Yale University, records

**DATES:** 1927-1985

**PHYSICAL DESCRIPTION:** 129 linear feet (126 boxes)

**LANGUAGE:** English

**SUMMARY:** The records consist of reports, statements, and working files of the Yale Budget Office.

**ONLINE FINDING AID:** To cite or bookmark this finding aid, please use the following link: <https://hdl.handle.net/10079/fa/mssa.ru.0718>

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## Requesting Instructions

To request items from this collection for use in the Manuscripts and Archives reading room, please use the request links in the HTML version of this finding aid, available at <https://hdl.handle.net/10079/fa/mssa.ru.0718>.

To order reproductions from this collection, please go to [http://www.library.yale.edu/mssa/ifr\\_copy\\_order.html](http://www.library.yale.edu/mssa/ifr_copy_order.html). The information you will need to submit an order includes: the collection call number, collection title, series or accession number, box number, and folder number or name.

Key to the container abbreviations used in the PDF finding aid:

b.      box  
f.      folder

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## Administrative Information

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### Conditions Governing Access

Access to the records is partially restricted. See inventory for details.

Some records in this finding aid have been redacted, as they include student names, donor names, and other restricted data. These records will not appear in the published finding aid.

## Conditions Governing Use

Copyright for materials authored or otherwise produced as official business of Yale University is retained by Yale University. Copyright status for other collection materials is unknown. Transmission or reproduction of materials protected by U.S. Copyright Law (Title 17, U.S.C.) beyond that allowed by fair use requires the written permission of the copyright owners. Works not in the public domain cannot be commercially exploited without permission of the copyright owners. Responsibility for any use rests exclusively with the user.

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## Preferred Citation

Budget Office, Yale University, Records (RU 718). Manuscripts and Archives, Yale University Library.

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## Processing Information

Yale University records are arranged and described at the accession level by the creating office. The University Archives creates collection level descriptive records, but typically does no further arrangement and description at the accession level.

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## Scope and Contents

The records consist of reports, statements, and working files of the Yale Budget Office.

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## General note

Forms part of Yale Record Group 5-C (YRG 5-C), Budget records of Yale University.

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## Arrangement

The records are arranged by accession.

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## Collection Contents

### Accession 1979-A-022: Records, 1953-1980

Restricted until Jan 1, 2016.

b. 1, f. 61

Yale Health Plan

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**Accession 1981-A-049: Records, 1966-1980**

Restricted until Jan 1, 2016.

b. 2	1966/1967-1968/1969 Transfers
b. 2A	1966/1967-1968/1969 Transfers (cont'd)
b. 3	1971-1976 Operations budgets; Vassar-Yale Report; Reading file B.O. 1969 Jul - 1978 Jul
b. 4	1973/1974-1976/1977 budget worksheets and files; 1973 3rd balance; 1976 2nd balance
b. 6	1974/1975 and 1975/1976 transfers; 1975 Jun operations
b. 6A	1974/1975 and 1975/1976 transfers; 1975 Jun operations (cont'd)
b. 7	1975/1976 budgets 20-31; investment reports and special studies
b. 7A	1975/1976 budgets 20-31; investment reports and special studies (cont'd)
b. 8	1975/1976 budgets 31-49
b. 8A	1975/1976 budgets 31-49 (cont'd)
b. 9	1975/1976 budgets 50-60 and type codes
b. 9A	1975/1976 budgets 50-60 and type codes (cont'd)
b. 9B	1975 3rd balance; 1976 2nd balance
b. 10	1976/1977 budget
b. 10A	1976/1977 budget (cont'd)
b. 10B	1976/1977 budget (cont'd)
b. 11	1976/1977 budget (cont'd)
b. 11A	1976/1977 budget (cont'd)
b. 12	1976/1977 special studies
b. 12A	1976/1977 special studies (cont'd)
b. 13	1977/1978 budgets 20 to 31
b. 13A	1977/1978 budgets 20 to 31 (cont'd)
b. 14	1977/1978 budgets 32 to 69
b. 14A	1977/1978 budgets 32 to 69 (cont'd)
b. 14B	1977/1978 budgets 32 to 69 (cont'd)
b. 15	1977, 1978 Jun final and 1978 Jun 3rd balance, remaining balances of restricted funds
b. 19	1978 Jun remaining balances of restricted funds; 1979 Jun 3rd balance

**Accession 1982-A-049: Records, 1969-1979**

Restricted until January 1, 2030.

**Accession 1982-A-050: Records, 1969-1979**

The materials are open for research.

	1977-1978	
	1976-1977	
	1975-1976	
	1974-1975	
	1973-1974	
	1972-1973	
	1971-1972	
b. 3	Yale Health Plan	1971 March
b. 3	1971-1972 Budget and 1972-1973 Outlook (3)	1971 November
b. 3	1971-1972 Estimate and 1972-1973 Budget	1972 January
b. 3	Yale University Comparison of Actual and Budgeted Income and Expenses 1971-1972	1972 October
	1970-1971	
b. 3	Yale Health Plan	1971 March
	1969-1970	
	1968-1969	
	1967-1968	
	1966-1967	
	1965-1966	
	1964-1965	
	1963-1964	
	1962-1963	
	1961-1962	
	1954-1955	



**Accession 1982-A-051: Records, 1954-1982**

Restricted until Jan 1, 2018.

b. 7, f. 279	"University Planning for Private Prestige Schools" Janet Louise Mangold	undated
b. 7, f. 299	Yale Health Plan HMO Legislation	1974-1975
b. 7, f. 324	"Achieving Financial Equilibrium at Yale: A Report on the Budget Draft" (2 copies) (with comments and letters of response)	1977 November 15
b. 8, f. 330	1971/72 Budget and 1972/73 Projection R. N. Cooper	1972 October
b. 8, f. 332	1972/73 Budget and 1973/74 Projection R.N. Cooper	1973 October
b. 8, f. 333	1973/74 and 1974/75 Schedules	1973-1974
b. 8, f. 334	1974/75 Operating Budget R.N. Cooper	1974 April
b. 8, f. 335	1974/75 Proposed Budget	1974 April 9
b. 8, f. 336	1974/75 Budget R. Cooper and B.O. Report	1974 April 11
b. 8, f. 337	1973/74 Results 1974/75 Proposed R.N. Cooper	1974 December
b. 8, f. 345	"Study of the Economics of Higher Education at Yale University" (report)	undated
b. 8, f. 356	Yale Health Plan Special Reports	1973-1977
b. 8, f. 362	"Effects of Inflation on College and University Finances" T. Rowe Price	1976 February 21

**Accession 1982-A-052: Records, 1952-1981**

Restricted until Jan 1, 2017.

b. 2	1970-1971 Financial Plan Proposal to President Brewster (working notes)	1969 October
b. 2	1970-1971 Budget Progress Report	1970 June
b. 2	1971-1972 Budget Planning Problems	1970 September
b. 2	1971-1972 Interim Budget Report and Five Year Outlook	1971 January
b. 2	1971-1972 Budget and 1972-1973 Outlook	1971 November
b. 2	1971-1972 Comparison of Actual and Budgeted Income and Expenses	1972 October
b. 2	1972-1973 Approved Budget by Unit School BT-1	1972 October
b. 2	1973-1974 Budget Plan, Work Done to Date	1972 November
b. 2	1973-1974 Approved Budget, By Unit, By School BT-1	1973 October
b. 2	1974-1975 Preliminary Budget Information	1973 September
b. 2	Yale Finance and Administrative Meetings	19 79
b. 3	Yale Financial Statements Supplement for the fiscal year ending 1980 Jun	1980 June
b. 3	Draft of Operating Income and Expense 1972-1973 to 1976-1977 Volume I	1972-1977

**Accession 1982-A-056: Financial statements (microfiche), 1973-1981**

Restricted to Office of Origin only

**Accession 1983-A-080: Records, 1945-1982**

Restricted until Jan 1, 2018.

b. 1, f. 32	Yale Computer Center: pricing	1980-1981
b. 2, f. 62	Yale Computer Center	1977-1978
b. 2, f. 63	Yale Educational Corporation	1969
b. 2, f. 64	Yale University notices	1976-1978
b. 2, f. 65	Yale University press releases	1977

**Accession 1984-A-049: Records, 1979-1982**

Restricted until Jan 1, 2018.

**Accession 1984-A-050: Working papers, 1967-1980**

Restricted until Jan 1, 2016.

**Accession 1985-A-041: Records, 1968-1984**

Restricted until Jan 1, 2020.

**Accession 1985-A-042: Records, 1982-1983**

Restricted until Jan 1, 2019.

b. 6, f. 294

Xerox Copies of Material Sent to ADS

1979-1980

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**Accession 1985-A-043: Records, 1940-1983**

Open for research.

## Financial Reports

## Statements of Income and Expenses by Departments

b. 1, f. 1	1940-1941
b. 1, f. 2	1941-1942
b. 1, f. 3	1942-1943

## Detailed Statement of Treasurer's Report

b. 1, f. 4	1943-1944	
b. 1, f. 5	1944-1945	
b. 1, f. 6	1945-1946	
b. 1, f. 7 - 8	1946-1947	
b. 1, f. 9 - 10	1947-1948	
b. 1, f. 11 - 12	1948-1949	
b. 1, f. 13	1950-1951	
b. 1, f. 14	1952-1953	
b. 1, f. 15	1953-1954	
b. 1, f. 16	1954-1955	
b. 1, f. 17	1955-1956	
b. 1, f. 18	1956-1957	
b. 1, f. 19	1958-1959	
b. 1, f. 20	1959-1960	
b. 1, f. 21	Operating Income and Expense	1972-1977
b. 1, f. 22 - 23	Detail for Summary of Operating Income and Expenses - Fiscal 1973	1972-1973

## Correspondence, Budgets, Reports

b. 2, f. 24 - 25	Ackerman, Jan - Letterbook
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## Alumni Fund

b. 2, f. 26	1977 Sep 14 - 1980 Jun 30
b. 2, f. 27	1980 Jul 1 - 1981 Jun 30
b. 2, f. 28	1981 Jul 1 - 1982 Jun 30

## Correspondence, Budgets, Reports (continued)

b. 2, f. 29	Alumni Journal- Articles	
b. 2, f. 30	Assessments and Charges	1979-1980
b. 2, f. 31	Assessments and Income - Budget	1978-1979
b. 2, f. 32	Association of American Universities	
b. 2, f. 33	Banking Function	
b. 2, f. 34	The Blueprint - Publication by Association of Yale Alumni	
	Budget to actual comparison	
b. 2, f. 35	1977-1978	
b. 2, f. 36	1979-1980	
b. 2, f. 37	1980-1981	
b. 2, f. 38	Budget Adjustments	1980-1981
b. 2, f. 39	Budget Book	1982-1983
	Budget Instruction Guidelines	
b. 2, f. 40	1976-1977	
b. 2, f. 41	1977-1978	
b. 2, f. 42	1978-1979	
b. 2, f. 43	1979-1980	
b. 2, f. 44	1980-1981	
	Budget Officers' Conference	
b. 2, f. 45	1978	
b. 2, f. 46	1979	
b. 2, f. 47 - 48	1980	
b. 2, f. 49 - 50	Brown University	1982-1983
b. 3, f. 51	Bursary Employment - Budget Office	
b. 3, f. 52	Campaign for Yale	
b. 3, f. 53	Capital Budget - Process	
b. 3, f. 54	Comparative Data - Budget Systems Outside Yale	
b. 3, f. 55	Comparative Information - Temple University	
	Comparative Schools	
b. 3, f. 56	Admissions	

## Correspondence, Budgets, Reports &gt; Comparative Schools (continued)

b. 3, f. 57	Employee Benefits	
b. 3, f. 58	Counseling Costs	
b. 3, f. 59	Employee Compensation	1971 July-1972 March
	Employment	
b. 3, f. 60	Bursary Students	
b. 3, f. 61	Student	
b. 3, f. 62	Endowment - Historical Data	
b. 3, f. 63	Endowment Inc. Protections	
b. 3, f. 64	Endowment - Specific Funds and Special Invested Funds	
b. 3, f. 65	Energy Alternatives	
b. 3, f. 66	Energy Conservation	
b. 3, f. 67	Estimated Operating Results	1978-1979
b. 3, f. 68 - 69	Faculty-Administration Recovery	
b. 3, f. 70	Faculty Salary Expenses	1967-1977
b. 3, f. 71 - 72	Faculty Size	
b. 3, f. 73	Financial Accounting Systems	
	Financial Aid - Graduate School	
b. 3, f. 74	1977-1978	
b. 3, f. 75	1978-1979	
b. 3, f. 76	Financial - General - Historical Data	

**Accession 1985-A-044: Records, 1967-1985**

Restricted until Jan 1, 2021.

b. 1, f. 14	Divinity School	1969-1970
b. 1, f. 15	Drama School	1969-1978
b. 1, f. 33	Medical School	1970-1980
b. 3, f. 71	Yale College	1979-1981
b. 4, f. 106 - 107	Yale Dramatic Association	1983-1985

## **Accession 1989-A-033: Budget Records, 1973-1985**

Restricted until Jan 1, 2021.

b. 2, f. 15	Economic indicator	1979 January– 1977 December
b. 4, f. 32	Economic indicators	1974-1975
b. 4, f. 33	Economic indicators	1978-1980

**Accession 2001-A-106: Budget Records, 1927-Circa 1983**

Restricted until Jan 1, 2019.

## **Selected Search Terms**

The following terms have been used to index the description of this collection in the Library's online catalog. They are grouped by name of person or organization, by subject or location, and by occupation and listed alphabetically therein.

### **Subjects**

Universities and colleges -- Administration  
Universities and colleges -- Finance

### **Corporate Bodies**

Yale University. Office of Finance and  
Administration  
Yale University -- Administration  
Yale University -- Finance