

Creative or is it Subtle Budgeting?

When I told my husband that I had to prepare something for this meeting - he fell about laughing - I find it difficult to balance my cheque book - and I am a high achieving spender of the family budget - so whether I am going to be much help in this matter is questionable.

I found a good article on library budgeting on the net recently which said ***"that a budget is not a set of numbers but a reflection of mission, goal, plan and intention"***.... And I think it is worth remembering because we as the library are a department within a bigger organisation - and within our own library policies we have missions goals etc.....and we have a good deal of professional pride in what we are doing.

We don't have enormous budget here at Marsden, and over the last five years it has gone down with the amazing regularity - however we are survivors and optimists.

The key to the whole process is in the next door Office - the Principal.

Happily she is pro- libraries particularly as the Information Centre of the school - however even she can't make money where there is none - and we are dependent on "bums" on seats to pay for everything.

Our poor Principal is deluged with articles (both paper and electronic) on how the library adds value to student learning (I suspect she thinks I find them all - but mainly Bill Siddells and the listserv do). This is one of the keys to the process; she needs to be reminded that the library has a high profile. I endeavour to meet with the Principal once a term just to up date her on where we are at and where we are going and where I want to be. I always give her back a written informal report on the meeting.

I know this is easier said than done - but it is really worth the exercise and the preparation. I can't imagine a Principal shutting the door on any staff member. If you have a TLR go with her.

Communicate with other departments - over the tea cups, in corridors Be aware of what is going on and what is coming up. New curriculum subjects, NCEA and for us Cambridge Internationals. It wasn't until I got into discussion with our Dean of Academic Services about Ethics and philosophy that she even thought it was my job to support the curriculum. She reads a lot for recreation, but she is a mathematician and the Maths Dept is the lowest user of the library. Having got her on my side I then started wooing the Maths Dept carefully - proof-reading their reports (good for me as I know virtually nothing about maths), asking them to come and consider their part of the library collection (with coffee and muffins of course). I now have far less unused maths books and they have written a couple of units using the library. I know that may mean more work for me - but we are a service focussed library and the more students and staff we get in - the more a case I can make for more \$\$

Another person worth getting on side with is the **Business/Finance manager** - he (or she) who is the number cruncher. He/or She may not have used the library or even have been in the place. If you get them on side they can be a great help in finding little bit of money here/or there to stretch things a bit.

And the other department that I think it is worth getting along side is the **IT dept.** Not only do they support your software - they can also tell you what is going on and is being planned in their department. The technological needs for our hardware are one thing - but the criteria for selecting and buying software is equally important and can save you a lot of money (you can save them money too)

Keep a few **statistics.** Not only issue statistics; what about classroom bookings; library staff time required for helping with the photocopier - NCEA has really increased this a hundredfold, how many times a day do you have to recharge the video cameras; preparation of your own lessons etc...how many resource boxes do you have to put together... OK all our tasks are different but they all take time - and often away from our core work.

We collect stats for one week each term. You would be surprised at how things move and change and you don't notice it. For those of you who have to budget for staff this is the best proof of the workload....and also gives you an insight into how you really fill in the day.

So having set the scene you then have to decide what you want from the meagre budget, and how to find the extra dosh to get it.

The budget process is different in every school; and you have to somehow find your own way of doing it and filling out the forms. This may first mean a trip to that business manager. He probably doesn't realise that the library operates differently from other departments and the standard form just isn't user friendly. Make sure you understand how the library fits into the scheme of things.....in our game "I didn't know that" is not a good response.

Prepare your budget and be aware of some of the other things that sneak up on you -

Weeding the collection - part of it will need to be replaced

Lost books - some of these will need to be replaced (what happens to the refunded money from lost books)

Support fees - our library software;

Professional development. Don't forget the conference in ChCh next year

Barcodes/security - have you got enough for the year

Make a good case for anything special - research it; trial it - and get everyone using it before you buy it.

Document it ; and if it is a one-off project - who will use it; how it will be used; where it will be used, and how it will enhance learning (how it may save money)

Look forward - particularly if it is going to require an annual subscription - you don't want to be in the position of covering yourself for year one only

Where is the extra cash - well there is probably not much but there are some things you can do to access more.

If it is a cross-curricula resource - trying getting a little bit of budget from everyone (that is from each department). I know Barbara has done this at Onslow with World Book online.

If there are some specialist books which you might "like" trying sharing the cost with a department - we have had great success with this and the Textile and Design Dept where the books are expensive. If it is on your catalogue - everyone can access it

Can you form a consortia with other schools - we have a great one with some Auckland Schools for Galenet

What about other parts of the **School family** - the Parents Assn; past pupils - The school puts a "wish list to the Parents Assn each year. I make sure I have an item on it each time - even if I don't get it - I have made sure that the library is seen to have a need (and eventually they may feel guilty). Find out what they are fund raising for - and you will probably find that there is a bit for you - you may even be able to offer a bit of help.

The **McCarthy Trust** (in Wellington) miraculously provides money every two years. Make sure you know when it comes (around November) and have something ready to spend it on - or at least a plan or you may find it gobbled up by someone else.

Bargain with booksellers for a better discount. See what deals are available

*What happens to those **refunds of lost books**.....if it goes into the consolidated fund... you may just be able to "charm" them back into the budget

*Can some of those barcodes come out of the **School stationery budget** (after all those on the teacher resources don't actually reside in the library) - and perhaps some of your other stationery costs could be dealt with elsewhere

*Could some of the videos used predominantly by one department - be partly paid for by them - but centrally catalogued so they can be accessed

As an eternal optimist I keep a wish list all the time - just in case someone wants to buy something for the library - parent/student/ old girl - I consider this list is "icing on the cake stuff" but it usually needs to be dealt to quickly

So you have drawn up your budget

Take it to the **Principal** for discussion before it is present to the money - crunchers. Be prepared to negotiate, compromise and discuss (suggest some of the other sources of funds)... but document decisions. We had to do this when we replaced the security system four years ago. We could only afford

part of the deal; the finance staff changed ; the library staff changed but as it was documented I managed to get the money to complete the process this year - three years later.

There was a nice list of "do's and don't s when negotiating I found on the net which I thought were quite useful (can't wait to try them out my husband). There are some copies for your interest and for trial on the back table.

Having discussed the budget with the Principal she will be able to support it before the Board, or the Business manager. Knowledge is power.

Then send it off to the right place take deep breath and wait.

You may not get all you ask for....the dollars may just not be there - but remember

1. Money isn't always the answer to a better service to staff and students
2. Don't give up hope - there is always next year

When you don't have enough Some guides for discussing you needs with the "purse holders"

| Do's | Don'ts |
|---|---|
| <p>Do exception report. Don't stress what's good about your library. Instead emphasize the good things that aren't happening and tell people what it will take to ensure that it will happen</p> | <p>Don't become involved in politics Identifying with one particular department personally or professional may hurt your long-term chances of advancing the library's objectives.</p> |
| <p>Do define your library. Your Principal, staff and Board need to be told over, and over again what your role is in the school and learning is.</p> | <p>Don't use the words "cheap" or "inexpensive". Use the term cost-effective instead - I t conveys the concept that products and services have value - it does not sacrifice quality</p> |
| <p>Do leverage long-term financial support.Grants and donations provide additional funds - use these to support new and needed initiatives and use their success to leverage further support</p> | <p>Don't shift costs If funds are cut' cut services. This will generate pressure on decision makers to reconsider funding cuts.</p> |
| <p>Do keep a high profile Publicise your library and its services -school newsletters; school magazine, annual report, speak to Parents Assn, Board etc....ask staff in for morning tea to chose holiday reading etc..</p> | <p>Don't let the budget drive your program. Programming should drive the budget. This will ensure that all your budget requirements are genuine and necessary.</p> |

In all cases , building a good relationship and a strong reputation is the key,
This takes time and should be done before you need the money or the
support, not when you are in crisis mode.

Adapted from a list compiled by Michelle Budt and Sean O'Hanlon
http://alexia.lis.uiuc.edu/~ruhleder/lis405/topic.budget_thoughts.html

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