IowaTown School Library

PREPARING YOUR ANNUAL BUDGET REQUEST

Rationale

In order for school libraries to successfully implement the Iowa School Library Program Guidelines, sufficient funding must be secured to improve library collections—print, non-print, and electronic—and technology. Library facilities also need regular attention to assure that they are functional, inviting and reflective of changing practice including the incorporation of new technologies.

The 2006 requirements for school libraries state that, "***A plan for annual updating and replacing of library materials, supports, and equipment is in place*** **(***IAC) 12.3(12)).* The School Library Program Guidelines further state that:

- The library program is funded at a level sufficient to update materials and equipment in support of the curriculum and other school program goals.
- The **teacher librarian submits an annual budget request** that includes library resources and supplies as well as computers and other equipment that support the curriculum and other school program goals.
- A long-range budget plan includes funds for facility improvements, staff, emerging technologies, professional development and other needs.

It is not enough to simply say that you need money to buy books and materials. Budget planning is a thoughtful process in which you must advocate for your program needs to your administrator and others who are involved in budgeting decisions. You must build a case based upon how your program will use budget funds to contribute to the achievement of school and district goals for student learning. Karen Lowe provides a powerful tool for budget planning with her "Resource Alignment" strategy in which collections are mapped to school curriculum as a means of identifying gaps and priorities for collection development and budgeting.[1] Help in using Lowe's work is available through Iowa's AEAs. We must also be prepared to demonstrate how better computers, more functional facilities and added staff contribute to student achievement.

Budget Basics

School budgets in Iowa are based upon a formula that combines direct funding from the state with local property tax funding in order to equalize the per pupil expenditure in each school district. About 80 percent of this funding pays teacher and other salaries in the district; the other 20 percent covers such things as supplies including paper (a huge expense in all districts), textbooks, technology, building maintenance and classroom and library materials. Special funding including local option sales taxes and PPEL (Physical Plant and Equipment Levy) funds are targeted for spending on such things as building improvements and repairs. You are in competition for funding with many other departments and needs.

Generally the library will have several budget "lines," designated by numbers that represent categories for supplies, books, periodicals, software, etc. You should become familiar with the budgeting system in your building and district. The best way is to ask your principal to explain it to you. Be sure to also learn about accounting procedures and ask that you receive copies of district budget reports on the library accounts. (Note: In some districts, library budgets are determined at the district level. If that is the case in your district, ask the person who administers the library budget for guidance).

Preparing your Budget

In preparing your budget, you need to consider both short and long term needs. You must prioritize these needs and develop a budget that includes specific requests for the coming school year, as well as things you anticipate will need to be addressed down the road. The latter gives your administrator a "heads up" on future requests and can also be use useful if administrators are contacted by local groups who wish to contribute financially to the school or if there is extra building money that needs to be spent as the end of the school year nears. Tie your budget to your annual report so there is consistency and "reinforcement" of needs reflected there. Again, tie you budget requests to building goals and initiatives. Involve key people in your building in the budget planning process—see what teachers' needs and priorities are and incorporate them into your request. If you have a "Friends of the Library" group, make them aware of your needs and the proposed budget. Be sure the parent-teacher group is well informed about library needs. This is not only good practice, but gives you a built-in group of budget advocates.

Use the budget template link below or design your own to produce a professional looking budget proposal. When it is complete, make an appointment and discuss the plan with your administrator. Researcher Danny Callison has documented that preparing a budget and discussing in frequently with the administrator results in higher budget amounts for school libraries.[2] Communicate with teachers about your budget plans and needs as well.

Supporting Your Budget Request

As a part of your discussion with the principal, you can make a very good case that you are in a very favorable position to spend school funds wisely, through your knowledge of selection tools and principles, through special arrangements with book jobbers and supplies vendors and through your participation in such programs as the AEA Educator's Consortium. Use data from the School Library Survey Summary (see link on State Library website) to compare your school to those of comparable size across the state to help build a case for improvements in your budget. National surveys such as that completed every other year by *School Library Journal* can also be helpful in making the case for better budgets. A "value added" in centralizing book and equipment purchases through the library is increased accountability, since you have record-keeping systems in place to track circulation and use of equipment and materials. Another is that when the teacher librarian orders and receives materials and equipment, he/she takes responsibility for demonstrating and promoting their use throughout the school.

Finding funding for your library's needs is an ongoing task that requires commitment and creativity. Keep tract of "unmet needs," the things students and teachers request that you cannot provide. Use your "Friends of the Library" group to help you find additional money through fundraisers, grant writing and other avenues.

Accountability for Budget spending

Remember that you also have a responsibility to spend the funding you are provided with wisely and to keep careful records of all of your expenditures. Make Excel your friend! Buy where you get the best discounts. Take advantage of statewide coop purchasing. Be sure to include budget information in your annual (or more frequent) report to your principal. Again, Excel can be used to generate nice charts and graphs for this reporting.

One of the many joys of the job is seeing those lovely new books and other materials and technology arrive in your library. Careful and creative budgeting will make that happen!

1. Lowe, Karen R. (2008). *Resource Alignment: Providing Curriculum Support in the School Library Media Center.* Millers Creek, NC: Beacon Consulting.
2. School Library Journal Spending Survey. " Despite the recession, media specialists are making the best of a bad situation." *School Library Journal*, April, 2009.