



Telling Your Libraries' Fiscal and Service Story on One Page

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As part of the new budget model implementation, our University created the Central Unit Allocations Committee to review and evaluate all campus units' financial plans. This committee was comprised of academic and non-academic representatives from across campus may have had little familiarity with the mission, scope, and/or fiscal needs of the units it was reviewing.

To help the committee, stakeholders were required to produce a one-sided; one page document that covered four specific areas and the document deadline was within two weeks of the request. How do you boil down a multi-million dollar budget and explain the diverse collections, initiatives, and services of a twenty-first century academic library to just one page and in a few days? Not easily; but with planning, communication, and compromise it can be done.

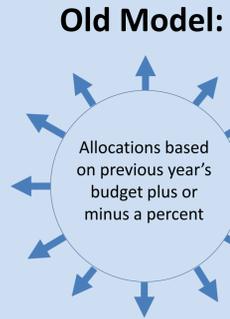
How the Libraries Responded

The Process:

The request for the one-pager came right before Thanksgiving while the Dean of the Libraries was out of town and was due the week of Thanksgiving. Much of the initial work of gathering information was done via e-mail.

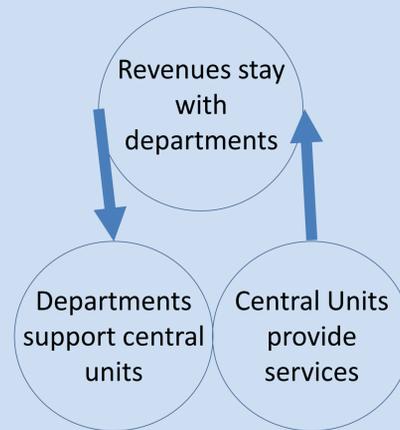


Over Simplified Models



- Problems:**
- Increased tuition dependency
 - Increased marketplace competition
 - Limited support for strategic priorities

New Model:



- Benefits:**
- Transparency
 - Ability to respond to changes

Central Unit Allocations Committee:

Make up: 20 Members

Charge:

- Promote collaboration
- Clarify expected service levels
- Evaluate funding levels for those service levels

Problem:

How do you explain your needs to a 20 member committee, many of whom do not have a familiarity of how that unit operates?

Answer

Prepare a one page, one-sided document that includes the following:

1. Mission Statement
2. Financial/Employee Data (Provided by Budget Office)
3. Organizational Overview (listing of departments/org chart)
4. Measurement Statistics(KPI/Benchmarking)
5. Basic Services/Additional Services

What the Libraries Learned

- The compressed time period required skillful communications
- The one page format fitted our organization relatively well
- There wasn't enough time to review and correct information provided from campus offices
- Library data is not centralized
- The information required limited our ability to tell the story we wanted

Two questions had to be answered:

- What was the goal of the document?
 - Assigned by Central Units Allocation Committee: to inform committee members about the Library
- What story should the document tell?
 - The Libraries are integral to members of the Auburn University community and can help facilitate the success of their instruction and research needs.

Continuing the Process:

- ← Ask questions
- ← Find answers
- Visualize data
- Storyboard ideas



From Storyboard to Final Document:

