

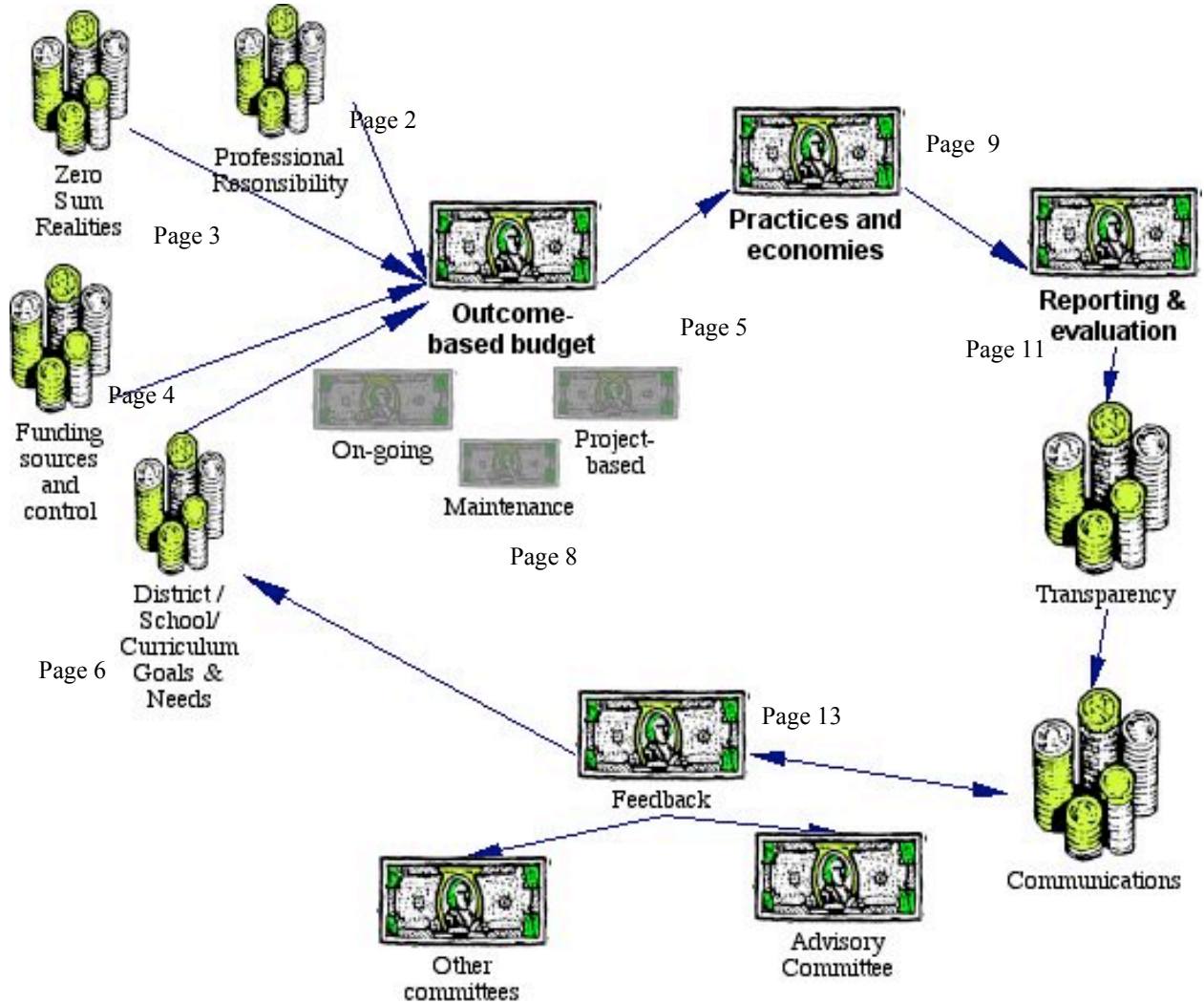
Zero-sum budgets and technology

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Money will buy a pretty good dog, but it won't buy the wag of its tail. Josh Billings

Arithmetic is being able to count up to twenty without taking your shoes off.

Mickey Mouse

Zero-sum budgets and technology

Based on a track record of building, obtaining and administering excellent technology budgets on both a building and district level, the presenter discusses current funding realities facing schools, gives a short primer on school district finance, describes types of budgets, outlines the elements of effective budgets, and suggests ways tech professionals can increase their influence in the budgeting process.

I know I have an ethical obligation to submit a budget even if it has not been requested or the chances of it being fully funded are slim.

It is ethically irresponsible *not* to have a budget. Too often we confuse having a budget with having a fully funded budget. Every tech program, district and building, needs to have a written, goal-oriented, specific proposed budget. If students are to have access to the resources necessary for an effective educational program, all technology directors must accurately inform decision-makers the cost of those resources. The greater outlays necessary for technology in schools, among other things, makes this more critical than ever.

As informational resources become available in both in print and digitally, we need to carefully appraise which format best suits curricular purposes and our budgets. Resource development strategies are more important than ever as our scarce resources need to be stretched to cover ever-higher demands. Materials and equipment purchased “just in case” or because they are the latest and greatest things but remain untouched by human hands are not just unwisely, but unethically, acquired.

No matter how poor a district may be, odds are that it has at least one exemplary, well-funded program. Maybe it’s science, maybe it’s the debate team, or maybe it’s girls’ tennis. It may as well be the technology program. By following some good budgetary practices and a few backyard political strategies, it is not only possible, but probable, that a tech director can make his or her program the district’s shining star.

Good budgeting is your responsibility.

Building tech specialists and media specialists will play an increasingly larger role in determining the funding for their programs as many school districts move toward decentralization. As funds are given to buildings, site teams will determine staffing and resources. District media supervisors, superintendents, and even principals will have less ability to support or protect programs.

A good budget can increase the effectiveness of your program even if the effort does not result in increased funds.

As much as I hate sounding like an anti-tax geezer, I have to say more money is not always the answer to better services to staff and students. A good budget requires planning, prioritizing, and accountability. When those things are done, better programming is the result - even without an increase in funds.

Notes:

I understand the concept that school district budgets are a “zero sum” game.

There is only so much money to be distributed.

In light of the current political climate about taxes, those of us in public education should revisit David Lewis’s *Eight Truths* about budgeting. His first Truth is just as applicable now as it was when published in 1991: “It is a zero sum game.” When talking about public library budgets, he explained: “There is no more money...The important truth is that those who provide the cash...will not give the library any more. They can’t because they don’t have it.” Schools, as well, seem to have reached a level of funding that the public is unlikely to substantially increase (if not decrease).

Does this mean no additional funds for your technology program?

Getting more money for your program means spending less money elsewhere in the school.

Not necessarily. Mr. Lewis suggests a way that middle managers (like technology coordinators) can get more money for their programs: “You can take it away from somebody else. If you believe in what you are doing, you have an obligation to try this.” Gulp.

I think this puts an awful lot of us outside our comfort zone. Aren’t we really “givers” of resources, skills, information, time, and effort? Fighting for an adequate budget, especially if it means butting heads with co-workers like department chairs, band directors, coaches, custodians, or union reps, certainly feels like being a “taker.” Want to make an enemy? Threaten the funding of a program that is owned by another educator.

But look carefully at the second part of Mr. Lewis’s statement - “If you believe in what you are doing, you have an obligation to try...” Folks, we better all believe deep in our hearts what we are doing is in the very best interest of our students and community, that spending what is necessary for an effective technology program is better than buying new textbooks or violins or smaller class sizes.

You have to believe in your mission.

So here’s the deal. You really need two psychological weapons when fighting to make your program a budget priority: a thick skin and a deep-felt mission. Without them, you’ll get eaten alive; with them, you can accomplish anything.

Strong feelings and fearlessness are of course greatly helped by a strong rationale for your budget. Today’s budgeting committees really need to be asking questions like:

- What programs teach the skills that will be vital to tomorrow’s citizens?
- What programs, skills and attributes does your community believe are important?
- How many teachers and students will benefit from a particular spending decision?
- Are there other sources of funds for activities which could be considered “non-essential?”
- How might a budget decision affect the school’s climate?
- Is there research to support the effectiveness of a program or specific spending decision?
- How much budgeting is being done out of respect for sentiment or tradition?

As technology coordinators, we need to do our homework. Our budgets must be specific, goal driven, and assessable. They must be both accurate and easy to understand. (Learn how to use a spreadsheet - you’ll never regret it.) And I hope our budgets are supported by research and sound reasoning. It’s up to us to let other educators know what research says about the impact computer technology has on teaching and learning and what 21st Century Skills look like. It is up to us to know and understand the curricular aims and objectives of the entire school and how we can help teachers meet them,

Finally a last quote from Mr. Lewis, something to think about when you have a few quiet moments: “It is unacceptable for others in your organization to misuse resources that could be better put to use by you.” Thanks, Mr. Lewis, for helping us see that we need to learn to be effective “takers” if we want to be good “givers.”

Notes:

I know a variety of sources for budget dollars and who controls those dollars including:

Federal dollars
Grant dollars (all grants, not just tech-specific grants)
Principal's discretionary budget (and what "budget dust" is)
PTA/PTO spending
Staff development dollars
Foundation monies
Referendum dollars

Consider your (re)sources

Schools get funding from a variety of sources. The percentage that any one of these sources contributes to a budget can widely vary from state to state, and even from district to district. But nearly all public schools get some funds from:

- A state aid formula is usually a baseline amount paid to all districts on a per pupil basis. It comes directly from the state budget.
- Local revenue, often from property taxes, is often a large percentage of many states' school budgets. It is this source of revenue which can create large funding disparities among districts.
- Special bond levies are usually passed to fund new buildings or sometimes large investments in technology. These usually require a public referendum. **(Watch this one: don't take out a mortgage to pay for a car.)**
- Federal funds in the form of block grants, Chapter grants or special grants. These monies are a small percentage of most school budgets, but are critical to specific programs.
- Private dollars from educational foundations, parent organizations or endowments are becoming increasingly important to districts with lots of community involvement and some wealth.
- Private and government agency grants can be a source of revenue for specific projects which address specific needs. Competition for large grants is becoming increasingly fierce, and good grant writing takes time, experience and talent. *Rather than writing technology-specific grants, you may be better off collaborating with other grant writers who may need technology resources.*
- Fund raisers can make small amounts of money for those who wish to hold them. Book fairs, candy sales, and car washes are best sponsored by a "Friends of the School" than directly by school personnel.

Budget makers need to exercise caution if they rely too heavily on funding sources from outside the regular school operating budget. If technology programs are to be viewed as core to the educational process, then funding for them should be from the regular school budget.

Learn about your district's budget

How much money does your school operate with each year? Where exactly does that money come from and where does it go? How much Block Grant money is available? What other special levies or grants are around? What is the budget for staff development? Your school's business manager can help you determine these budgets. They are by law public information. Visit with your school board representative and get his or her perspective on finance and the budget.

Take some time to learn how local tax rates are determined. Be prepared to take some time if you seriously want to understand these often Byzantine formulas. Learn the difference between capital funds and general funds. Know what tax abatements are. Take a school finance class at the local university. You will be able to amaze your friends, baffle your enemies, and never have to worry about running out of stimulating conversation.

Like other tech coordinators, I have taken my budget requests to my principal and been told there is no money in the budget. My follow-up questions then asked, "Is there money in the budget for textbooks? for band uniforms? for the office copier? for summer school?" If the answer to any of those questions was yes, then both the principal and I knew that the question was no longer one of "is there money in the budget," but "how do we chose to spend the money in the budget?" An important difference that opens the door to budgeting for reasons rather than tradition.

Learn who controls the budget.

Does the superintendent in your district traditionally distribute funds? The building principal? A hands-on kind of school board? Is the money allocated to buildings on a per pupil basis, and then controlled by a site-based decision making committee? Is there a Block Grant committee? Knowing to whom to submit a budget proposal is critical

Notes:

Budget dust. A good time to ask for money for a special project or piece of equipment is 30-40 days before the end of the school's fiscal year. Principals and others may be looking for ways to spend the small balances of their discretionary accounts (budget dust).

I can write an outcome driven budget that is specific in supporting curricular and school improvement goals.

Types of budgets.

There are a variety of ways to create budgets. Alice Warner describes six:

- lump sum
- formula
- line or line item
- program
- performance or function
- zero-based (Warner, 1993)

While it is good to know the distinctions among these budget types, they can basically be divided into two groups - those that are arbitrarily created and those that are outcome driven. How does budgeting work in your school: Are you given a sum of money and then told to make the most of it, or do you develop an effective program and then ask for the money to support it? If you are doing the former, change to the latter.

Get out your spreadsheets, and clearly show decision-makers how much money your program requires if it is to be effective. How can anyone give you what you want, if you yourself can't determine it or communicate it? Be sure they know the consequences in terms of student learning of an unfunded or underfunded budget.

Know and follow district budgeting schedules. If your capital outlay requests are due February 15, then have them in on the 14th.

Good budgets have three components:

Good program-driven budgets have three major components:

- goals - this is the effect my *funded* program will have on student learning
- specificity - this is how much money I want, and this is exactly how I will spend it
- assessment - this is how I will be able to tell you if the money you give my program helped it met its goals

Too often budgets have relied on state or national standards as a rationale for funds for resources. Just as there is cynicism about the political process across the nation, so is there a general distrust in statistics. The belief that statistics don't lie, but liars can use statistics is deeply and widely felt. (After all, 86% of all statistics are made up.)

Use local needs and objectives:

Communicate information about standards and studies, but build a budget based on the specific needs of your individual curricula, students, and teachers. The fact that Mrs. Green's science students need lab equipment will carry more weight than any state rule or national standard.

Relate your budget to your district's or building's long-range plans.

Use an advisory group

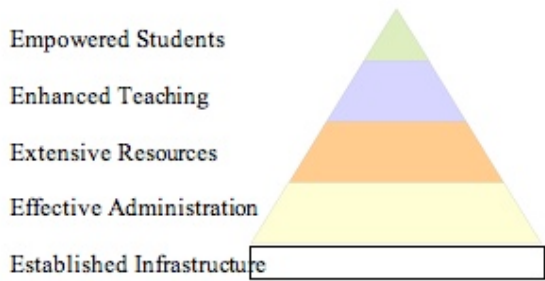
Remember also that media budgets which come as a recommendation of a media/technology advisory committee carry more weight than those developed by the individual media specialist. Who wants to turn down a whole group, especially if that group includes parents, students, and teachers?

Notes:

Mankato's Long-Term Tech Goals

Also see handouts at <<http://www.doug-johnson.com/dougwri/is-technology-making-a-difference-in-your-school.html>>

Mankato's Hierarchy of Educational Technology Needs



Established Infrastructure The district will have a reliable, adequate, cost-effective, and secure technology infrastructure that supports the learning, teaching, and administrative goals of the district.

Effective Administration The district will use technology to improve its administrative effectiveness through efficient business practices, communication, planning and record keeping.

Extensive Resources Technology will be used to provide the most current, accurate and extensive information resources possible to all learners in the district and community in a cost effective and reliable manner at maximum convenience to the user.

Enhanced Teaching All district teachers will have the technology training, skills and resources needed to assure students will meet local and state learning objectives and have the technological means to assess and record student progress.

Empowered Learners All students will demonstrate the mastered use of technology to access, process, organize, communicate and evaluate information in order to answer questions and solve problems

It goes without saying, but relate your budget to your tech plan. Oh, and have a tech plan.

I can list the areas for which I need to budget.

Budget organization

Ongoing expenses (fixed cost)	
Salaries and Benefits	
Networking Costs	
Administrative Systems Maintenance and Support	
Staff development	
Licenses	
Subscriptions	
Memberships	
Repairs/parts/supplies	
Other?	
Maintenance/replacement (see maintenance budget)	
Switches, servers, wiring, etc.	
Teacher computers/printers	
District Tech Equipment/AV equipment	
Lab computers/printers	
Other?	
One-time projects	
New building/classroom	
Wiring	
Classroom upgrades	
New software adoption	
Software	
Other?	

I like using the multiple “worksheet” feature of the Excel spreadsheet. My first worksheet is a broad overview of all areas for which I need to budget, then separate worksheets can be created for detailed accounting purposes. And of course, balances can be linked between worksheets.

Notes:

I can create a maintenance budget.

Administrators understand maintenance. They regularly budget for replacing roofs, tuck-pointing brick work, and resurfacing parking lots. They understand why windows, furnaces, and pencil sharpeners all need to be replaced now and again.

What these fine folks don't always understand is that instructional technology should be regularly maintained as well. Use the following formula with your collection, share the results with your budget people, and see if it makes a difference.

Doug's Magic? Formula for a Maintenance Budget

Here's one way to calculate what funds you should be spending to keep your resources up-to-date:

Maintenance budget = replacement rate X total number of items X average cost

(replacement rate = 100%/number of years in the life span of material)

Examples:

If a school has 50 VCRs which cost \$100 each and have a life span of 10 years,
then the maintenance budget for VCRs should be 10% X 50 X \$100 or \$500.

If the district has 20 servers with an average cost of \$2,000 and a lifespan of 5 years,
then the maintenance budget should be 20%* X 20 X \$2000 or \$8,000.

(*Remember the replacement rate is 100%/life span or 1.00/20 or 5%)

Here's one for you to try:

A school has 40 computers with a life span of 5 years. The average replacement cost of a computer is \$1000. How much should be spent each year to maintain the computers?

Replacement rate = 1.00/ _____ years

Maintenance = _____ X _____ X _____
Replacement rate Total number of items Average cost of an item

or

\$ _____ maintenance budget.

I would rather have one computer that works 100% of the time than two computers that each work 50% of the time - Doug

Notes:

Practices and economies

Sustainable Technology

With great fondness I sat down at my trusty little Macintosh Classic I donated to my wife's 5th grade classroom the other day. Big mistake. Turn it on - wait. Open the word processor - wait forever. Type a line - wait for the text to catch up. No color. No Internet connection. Can't see both margins of my document. Is this the computer I once loved and was sure I would use forever?

While the little machine was not the most powerful of computers on the market even when I bought it in 1990, it was pretty darn spiffy compared to the Apple IIc and the 8086 notebook computers I had been using. It had a mouse, crisp graphics, BIG 20 meg hard drive, full 2 meg of RAM, and a WYSIWYG word processor that allowed me easily change fonts and insert graphics. And the whole bundle, inkjet printer and all cost me less than \$2500. A bargain to the guy who once figured he had about \$4000 into his Apple IIe.

So what happened? My expectations grew along with the performance of the desktop computers I had been using, of course. While outgrowing my home computer may be a sad story to me personally and I will sop up any condolences you'd like to send me, the far bigger concern I have is in regard to the expectations of the teachers and students for whom I work. Like me, they have rising expectations of their computers. Unlike me, they are not administrators who can usually find the funds somewhere to upgrade their computers when needed. Plus there are just so darn many teachers and kids! If I need a little more RAM, it's 100 bucks. When a lab needs those extra chips, it's \$3000! What to do?

Well, maybe we need to take a lesson from farming. There is an economic and ecological philosophy called "sustainable agriculture." The folks who practice this method of farming believe that more should not be taken from the land than can be naturally replaced by it each year. By rotating crops, returning the used harvest to the fields (in usually a rather aromatic form), and having reasonable yield expectations, a farmer can leave the next generation a field in as fertile a condition as he found it.

Schools can and should practice "sustainable technology." This practice involves:

1) Not purchasing more technology than can be regularly maintained, upgraded and replaced. OK, get out your calculator. Johnson Middle School has 500 students and 20 classrooms. We want a computer in each classroom (20) and a 5:1 student computer ratio in labs and the media center (100). That's 120 computers in the building. People seem to be unhappy with computers much more than 5 years old. (Now every business manager reading this just shuddered, as did every technology coordinator for exactly the opposite reasons.) If I am going to replace my computers every 5 years, 20% of them need to be purchased new every year. Therefore, Johnson Elementary's computer budget needs to be (.20 replacement rate X 120 computers X \$1000) or \$24,000. Not just this year, but every year from now on. And that's just for computers. Better budget something for software upgrades, maintenance personnel, worn out printers and scanners, and network upgrades, too. What happens when you don't maintain? You get crappy computers older than the children using them, and teachers who won't use computers at all.

2) Rotating the technology. Some pretty sharp teachers at one of our high schools discovered this year how to give almost everyone a new computer - for about \$50,000. Here's how it works: the tech ed department buys new machines with the RAM, fast processors, and big hard drives needed to run its CAD software. The "pretty good" machines they had been using go to the business department where they will be used to do some desktop publishing, presentations and office practice stuff. The library gets the hand-me-downs from the business department for research and multimedia use. And finally the oldest machines go from the library to teachers and the English department's writing lab. And we sell the machines they had been using to marine supply stores to use as boat anchors. Pretty smart, huh? The elementary schools use a modified version of this, but it is the classrooms that get the newest computers so the teachers can learn how to use them before they head for the labs.

3) Having reasonable expectations. If each of Johnson Middle School's classrooms has a computer and there is a 5:1 student to computer ratio in the building, it will need to spend about \$48 per student on hardware each and every year. (\$24,000 ÷ 500). This is what? - about 1% of an average school's per pupil budget? Let's modestly add another 1% for technical support and staff training; and another 1% for software, maintenance fees, Internet fees, and network upkeep. In the best of all possible worlds (which a school is certainly not) that 5:1 computer to student ratio should allow each child about 80 minutes of computer use per day. Time enough to write a story, do some research, practice some skills, or send and receive e-mail. I believe 80 minutes a day is not enough, given the power and importance technology will play in most students' jobs and lives. But it is a far better ratio than most schools have now.

In a recent poll by Public Agenda, both teachers and the general public rank computer skills more crucial than Shakespeare, history, science, advanced math and even sports! (Only the 3 R's and good work habits were ranked higher by the public.) Surely, school administrators, state education departments and legislators can get behind sustainable technology in schools with a 3% effort.

Getting the most bang for your tech buck...

1. **Limit the life of your equipment.** We don't touch any computer except to put it in recycling that is over 5 years old.
2. **Re-purpose.** We use machines until they stop working, but we spend no time, effort or money on keeping old machines going – they have to be placed in a non-mission critical areas. It's a little embarrassing but we still have a kindergarten teacher using MECC programs on an AppleIIe in her classroom.
3. **Get price quotes on EVERYTHING.** Watch the legal requirements for getting bids. Over a certain amount, state law requires we go to formal bid. We get at least a couple quotes on everything, even if it is on a state contract. Takes little time and saves us a lot. Even with tried and true vendors, get quotes now and then just so they keep their pencils sharp.
4. **Take advantage of group purchases.** Check costs in your state equipment contract and state-wide purchasing plans. Take advantage of regional purchases when possible. Cost savings plus the chance of regional support/training.
5. **Purchase warranted reconditioned computers.** There are pros and cons to this. If the computer is in a lab setting and does not need a lot of power, reconditioned computers can provide a low-cost alternative. Make sure they come with at least a three-year warrantee and from a reputable company. (If a lab needs 30 computers, we usually buy 32 or 33 when buying reconditioned.)
6. **Low cost without support is expensive.** We are willing to pay a little more, especially for large systems when good support and warranties come with the product. I like buying local for this reason to. It's nice to have a near-by throat to choke if something goes wrong (and taxpayers like seeing money kept in the community.)
7. **Should you use open source?** I like open source as a philosophy, but it may not be as practical as one would want since it often requires a high level of maintenance by people with specialized skills. What you save in licenses is often spent many times over in labor costs.
8. **Share your budget with anyone who asks.** Total transparency in the budgeting and spending is required. Every expenditure should be documented, spent to budget, and you should be able to explain why the material or services were acquired. This means...
9. **Explain it to me like I was 5 years old.** This means that if you are a pointy-haired director, you need to understand on at least an operational level why buying that Level Seven switch or managed wireless transmitter or network management software is necessary.
10. **Standardize.** It's easier to stock parts, maintain, cannibalize, and train when you have a single model of about anything to support. This is not always possible, but we strive for it.
11. **Make sure all equipment purchases go through your department.** Equipment we don't order doesn't get district services.
12. **How do we best spend referendum funds (capital referendum vs. operating ie. on-going referendum)?** Don't take out a 20 year mortgage to buy a car that only lasts 5 years. Unless there is an ongoing source of funds or there is a desperate need for a large influx of computers, don't spend one time monies on stuff that has a short life span. Network upgrades and wiring – stuff that will last is a better use of these sorts of funds.
13. **Should you lease?** Leases lessen your overall buying power. It's better to figure out a 5-year replacement plan if possible. Leases can trap you since you almost have to take a new one out when the old one expires since all the leased equipment is old. It also can commit you to future years where the funding may be less.
14. **What's an ASP?** Application service providers who host and maintain a service for a district can be a real labor and cost savings. I also (perhaps mistakenly) assume these folks understand and are diligent about security, back-ups, upgrades etc.

Notes:

I report to budget decision-makers how past budget dollars have been spent.

One powerful way to convince others you should be given additional funding is to remind them how successful you have been with your past budgets. Remind them about how many people your program serves and how much of the curriculum depends on it. Get others on the staff to support your budget or items in your budget.

Don't just deal in numbers either. Let folks know how individuals, both teacher and student, have been helped by your program. The one common denominator that all effective salespeople have is the ability to tell a good story - to personalize the facts. Hey, and who can tell stories better than we can? "You should have seen the kids lined up before school opened to get into the media center to use the new computers. You all know how Johnny Smith never gets excited about anything in school. If you'd have seen him find the NASA website, you wouldn't have recognized him."

Transparent budgets

It's budget time in my district and I am making the rounds. I will be taking my eight page draft budget proposal to the elementary principals' meeting, the secondary principals' meeting, the district media/technology advisory committee, the media specialists' meeting and the district curriculum council - almost every meeting at which stale coffee and rolls are served and I can get people to listen.

Actually it is not difficult to get people's attention when money is involved, and as sums go, a fairly hefty amount at that. Add the mystery of technology to intrigue that always surrounds budgeting and most groups become rapt and often confused. You also have the players whose motto is: "Never pay for something out of your budget you can get somebody else to pay for." I'm not bad at that game myself. My (unexpressed) belief is that it morally reprehensible to let others spend money I could better spend myself.

Though with the support and encouragement of our ex-business manager superintendent, I've always worked for transparency when it comes to technology funding in the district. No secret funds. No special deals. No off-shore bank accounts. I take pride in knowing how every dollar is spent every year in my department, on what and why. If anyone wants to go through all the purchase orders, I have copies and, given half a day or so, I would be happy to explain what each and every expenditure was about. This is a habit I picked up as a school library media specialist. I quickly realized that I was one of the very, very few people in my building who actually had discretionary funds (and discretionary time) and therefore need to be uber-accountable if I was not to be viewed with suspicion.

The transparent budget requires that one listen to others as well. At one meeting this week I heard that there may be a greater need for tech training for new staff than I had been aware of, so a budget adjustment will be in order, mostly likely shifting some money from hardware to staff development. It's why the proposal clearly says "draft" and shows a commitment to shared goal setting, shared planning, and shared decision-making. I don't really expect huge changes in this proposal, but the ones that will be made will make it better. I'm convinced.

Transparent budgets also go a long way in helping people be more understanding when certain tech needs can't be met. "But remember, we shifted money from line x to line y last spring." Oh, yeah, I forgot.

Too often we in technology use the wizard mentality to get or keep power - knowing those mysterious things no one else does in order to keep others dependent on us. Problem is that it is sort of lonely in the wizard's cave. Demystifying technology - including technology budgets - is the smarter move - for both the school and the tech director.

I can describe the "consequences" of an under-funded budget in concrete terms.

What won't happen may be as important as what will happen.

We need to make the case that inadequate or reduced technology funding will have an impact on school programs, school operations, the classroom curriculum, and student achievement.

Specificity and goal orientation

This is easier to do if your budget proposals are specific and goal driven. In visiting with the person or team that makes budget decisions, you can say things like:

- I won't be able to purchase the database that supports the revised 9th grade history class the teachers requested.
- Teachers will only get one ink cartridge for their printers this year instead of 3 as in past years.
- Only four students will be able to use the research terminals in the library at a time.
- With the reduced tech staffing, I won't be able to maintain the school webpage.
- Online state testing may be unreliable harmful to test scores.

You will need to use your very best interpersonal skills to make sure these predicted outcomes don't simply sound like threats. Give budget decision-makers the entire budget and be open to their ideas about how to economize.

I can use technology to improve my budgeting and communication skills.

Actions do speak louder than words! What better way to convince decision-makers of the power of information technology, than by using technology when creating and presenting a budget. These tools are ones which every budget maker needs to master:

A spreadsheet

While they come with a variety names, features, and price, all spreadsheets basically do two main tasks for budget makers:

- they allow you to easily add and subtract numbers
- they allow you to display those numbers in readable columns and rows or as charts and graphs

Budget makers can create easily “what-if” scenarios using a spreadsheet: What if we order 50 computers with 2Gig of RAM rather than 1Gig of RAM?

Spreadsheets are also an efficient means for keeping track of the money you have allocated. A simple bookkeeping system which records the date, purchase order number, vendor, item and amount can do wonders in solving any discrepancies between your records and your business office’s accounts.

A word processor

One of the most popular refrains in writing classes has always been, “Does neatness count?” It did, and it still does.

A clear and readable narrative of your budget helps “sell” it. Good organization, correct grammar and spelling, and a clean layout are all more easily accomplished using a word processor. A sophisticated user can create use bulleted items for eye appeal and ease of reading, select appealing fonts for impact, and add graphics for illustration and interest. Robin William’s classic book *The Mac is Not a Typewriter* is an excellent primer for effective document layout.

A presentation program

When pitching your budget to a decision-making group, a computerized presentation program can help your audience literally “see” the points you are making.

Full colored slides containing text, illustrations, graphics, charts, animation, and sound are created on a computer and then displayed on projection screen using an LCD projector. These are displayed as the presentation is given. Sophisticated presentation programs give you the ability to create lists of bulleted items which “fly” onto the screen to create a “build,” create links to other slides or other programs, and use a variety of dissolves when changing slides. The stand alone presentation programs also include ready made backdrops, layouts, chart makers, and clip art.

HPTUK: Pepper your PowerPoint with HPTUKs – Happy, Productive, Technology Using Kids.



Notes:

I know how an advisory committee can help build budget support.

Advisory Advice

No, this section is not sponsored by the Department of Redundancy Department. I am advising you to form an advisory committee if you don't already have one.

Such a group can be a great help for the media specialist or technology coordinator at either the building or the district level. My advisory committees have given me terrific ideas, huge challenges, and timely warnings over the years. The first group I formed was just a few teachers and a couple of parents from the high school where I was the media specialist. For a little wine and cheese, these wise folks would leave their families and far more interesting activities to come to my house and talk about libraries and computers and how adolescents learn best. We hammered out an articulated vision of what a tech program should do. They helped me set my professional goals, and then listened when I reported my trials and triumphs. It was the best deal I ever made. My advisory committees have become larger and more formal since that time, but they still serve very much the same purpose: to help me make better decisions.

Qualities of an effective advisory group.

After having been served by and served on a number of these groups, I offer some advisory advice:

- Keep your group small. Any committee much larger than a dozen is difficult to get together and difficult to bring to consensus. If you need a much larger representation, keep your full meetings few and do most of your work in sub-committees.
- Work for a wide representation of stake holders who serve limited terms. My current committee is comprised of teachers, students, board members and administrators, of course. But parents, business people, a multi-type library representative, and post-secondary educators also serve. Our computer coordinator and network manager are permanent members. Next year I would like to add a representative from community education. As our schools work to become more of a whole community asset, this person will be important. We don't have a set selection process for membership, but no one serves for more than 3 years. Remember when selecting your members, that communication is a two-way street. What your representatives learn at your meetings will be taken back and shared with that person's colleagues. Great public relations.
- Have few, but important, meetings. Advisory committees only need to meet 3 to 4 time a year. A fall meeting is a good time to establish working subcommittees and refine the year's goals. One or two meetings to work on budget or policy issues in the winter and a final spring meeting to review the year's work and set objectives for the coming school year are usually enough. Setting our meeting dates for the year at our first meeting makes them a priority for many members. Take attendance, and include who is there in your minutes. There are several guides to running effective meetings on the market. Buy one and read it. Your committee will thank you, and it beats trying to remember Roberts Rules of Order.
- Send out good agendas and write clear, concise minutes which are quickly distributed. If members see agenda items which they think are important (how the budget to be divided up this year, for example), they'll be more likely to attend. All my advisory group members use e-mail and we rarely send hard copies of anything through the mail. I e-mail myself a copy of all agendas and minutes for easy filing and retrieval.

Well-defined responsibilities.

- Finally, give your group well-defined responsibilities. A committee should not be making your professional decisions for you, but it should have the power to shape the direction of the media/technology program. And well it should, since these folks, as well as you, will be held responsible for the program's weaknesses as well as its strengths. My advisory committee works on:
 - long range planning and goals
 - setting my department's yearly objectives
 - creating budgeting formulas and procedures, and reviewing building technology plans
 - policy making

And that's about all the work we can do.

Ours can be a professionally lonely profession. In all but the largest schools, there is rarely more than a single media specialist or tech coordinator. We are outnumbered by kindergarten teachers, custodians, coaches, special education aides, and administrators. An advisory committee is one way of giving ownership of the media technology program to a body of stake holders in the building. If the goals, the budget, the assessments, the long range plan are known to be important to more than just a single person, when they are presented to decision-makers they will carry more weight. And if your advisory group includes parents, community members and students, it will be seen as a very important body indeed.

I know the importance of serving in school, professional and political organization leadership roles.

Committee meetings are among the best places to gather data of use to you when planning and budget-making. What are the problems, goals and hopes of other educators? Once know, there may be technology applications that can be used to meet the needs of teachers and administrators. Really, really.

At the school level.

Volunteer or run for governing committees. I am always shocked by how few individuals in an organization want to be decision makers. Serving on these bodies always takes extra time. But hey, one learns to love those 7:00 am meetings.

Make a list of groups who make decisions in your school. Do you have:

- A site council or a committee that writes building goals and improvement plans?
- Curriculum committees?
- Staff development committees?
- A parent-teacher organization?
- Committees that interview and select new staff members?
- Textbook selection committees?
- Accreditation team?

If you have a chance to take a decision making role and do not, you've lost all whining rights about the choices that are made for you.

Work with other groups.

There are other groups in schools which have educational goals and political agendas, some of which may be closely aligned with those of the technology program. Our district has a legislative committee which meets during the sessions. We formulate a list of three or four items we feel are of particular importance to our district, and find ways to let our local legislators know about them.

Nearly all state and national associations with educational affiliations have legislative platforms - the school board association, administrators associations, parent-teacher organizations, the NEA and AFT, etc. These organizations often hold forums for local politicians. Attend, get informed and get active. Our state library and tech organizations sponsors a yearly library legislative day which gives technologists and media specialists from around the state a chance to visit with their legislators. Usually the school people are scarce at this gathering. Join us.

Is one of your faculty, a neighbor, or church member in the legislature? Schmooze. Write letters. Send e-mail.

Participate in local politics.

County political party meetings and fund raisers often give you a chance to visit with a variety of local politicians. It's always nice to be able to start a conversation with your senator by saying, "As we were discussing at the fall fund raiser..."

Help pass bond issues and elect school board members. Members of the community who have children in school and therefore a vested interest in schools are becoming a smaller and smaller percentage of the total population. It's therefore taking increasingly more work to get referendums passed and progressive board candidates voted in.

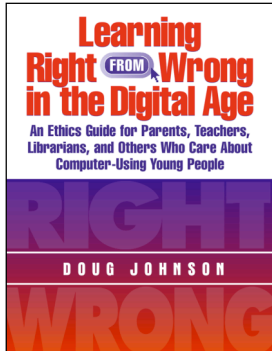
Offer to give short talks at service groups like Kiwanis, Sertoma, and Lions. Inform the community about your program, and fill the talk with specific times your program helped individual students.

Of course one can always make the ultimate sacrifice: run for office. We all wanted to know about the skeletons in your closet anyway!

Notes:

Resources:

- Lewis, D. "Eight Truths for Middle Managers in Lean Times". *Library Journal*, Sept. 1991.
- Johnson, D. "Budgeting for Lean Mean Times" *The Indispensable Librarian*, Linworth 1997 (800-786-5017)
- Johnson, D. "Giving and Taking" *Technology Connection*. Oct 1996
- Johnson, D. "Ethics in the Use of Technology" *Ethics in School Librarianship: A Reader*. Ed by Carol Simpson. Linworth, 2003
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- Warner, A. "Library Budget Primer". *Wilson Library Bulletin*. May 1993
- Williams, R. *The Mac (PC) Is Not a Typewriter*. Berkeley: Peach Pit Press, 1990.



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