



Preservation Services Leaflet

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Preservation Budget Planning

Budgeting is an essential part of preservation planning. In order to develop a preservation budget, the staff must first identify the funds already being spent on preservation, then estimate the funds that are needed. The budget worksheet on the following pages is intended to aid in that process.

Many institutions neglect to recognize the number of existing, routine budget items that may qualify as preservation expenditures. To use these as preservation expenses often requires only a re-thinking of the institution's goals. For example, most libraries already commit funds in their personnel and operating budgets to library binding. That may not qualify as preservation expenditure if the staff regards only the color of the binding and the accuracy of the spine stamping. If, however, the staff begins to select binding methods in accordance with the library's preservation goals, these expenses clearly become a part of the preservation budget.

This worksheet is intended for four purposes. First, it should educate planners about the many line items that should be considered part of the institution's preservation budget, whether or not they are now spent in such a way as to support preservation goals. The list of budget items should demonstrate that many preservation expenses are already in most institution's budgets. Second, the worksheet can be used to capture the current budget levels. Third, the institution can assess the funds needed to meet its preservation goals within each category. Finally, the difference between the current budget and the funds needed will allow the institution to quantify its financial needs.

Budget Item	Current Budget	Funds Needed
<u>Personnel:</u>		
preservation officer or coordinator	\$ _____	\$ _____
preservation committee members	_____	_____
shelf preparation or materials processing staff	_____	_____
stack maintenance (shelvers)	_____	_____
archives/manuscripts processing staff	_____	_____
repair staff	_____	_____
bindery preparations staff	_____	_____
microfilming or digitizing staff	_____	_____
selectors/curators	_____	_____
cataloging/searching staff (involved in replacement, microfilming, and digitizing)	_____	_____
interlibrary loan	_____	_____
catalog/upgrading records	_____	_____
housekeeping staff	_____	_____
building maintenance staff	_____	_____
other:	_____	_____
_____	_____	_____
_____	_____	_____

Budget Item	Current Budget	Funds Needed
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Training and Travel:

professional conferences	\$ _____	\$ _____
continuing education events	_____	_____
trips to library bindery	_____	_____
inspection visits to microfilming or digitizing agency & storage facilities	_____	_____
other:	_____	_____
_____	_____	_____
_____	_____	_____

Acquisitions:

hard-copy reprints, new editions	\$ _____	\$ _____
microfilm or digital replacements	_____	_____
reference collections for staff use	_____	_____
other:	_____	_____
_____	_____	_____
_____	_____	_____

Contracted Services:

library binding	\$ _____	\$ _____
preservation photocopying	_____	_____
construction of protective enclosures (phase boxes, clamshell boxes, etc.)	_____	_____
preservation microfilming	_____	_____
storage of master negatives	_____	_____
storage of master and backup digital files	_____	_____
conservation treatment	_____	_____
printing handouts for user education	_____	_____
consultants	_____	_____
pest control	_____	_____
other:	_____	_____
_____	_____	_____
_____	_____	_____

Supplies:

book plates, pockets, labels, etc.	\$ _____	\$ _____
repair supplies	_____	_____
bookends	_____	_____
archival folders and boxes	_____	_____
other archival processing supplies	_____	_____
alkaline photocopy paper	_____	_____
cotton/linen tying tape	_____	_____
disaster kits	_____	_____
exhibition supplies	_____	_____
ultraviolet filtering sleeves or film	_____	_____
other:	_____	_____
_____	_____	_____
_____	_____	_____

Budget Item	Current Budget	Funds Needed
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Furnishings:

shelving units	\$ _____	\$ _____
map cases	_____	_____
exhibit cases	_____	_____
curtains and window binds	_____	_____

Equipment:

repair equipment (book presses, paper cutters, boards shears, etc.)	\$ _____	\$ _____
environmental monitoring equipment	_____	_____
photocopiers	_____	_____
portable dehumidifiers	_____	_____
air conditioners (window units)	_____	_____
book trucks	_____	_____
scanners	_____	_____
software/hardware for digitization and digital preservation	_____	_____
other:	_____	_____
_____	_____	_____
_____	_____	_____

Capital Expenditures:

building modifications	\$ _____	\$ _____
upgrade of heating/air- conditioning system	_____	_____
other:	_____	_____
_____	_____	_____
_____	_____	_____

TOTAL	\$ _____	\$ _____
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NEW FUNDS NEEDED	\$ _____	\$ _____
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(Funds Needed minus Current Budget)

Last updated 02/2008