



How to Win the Fight for Funding

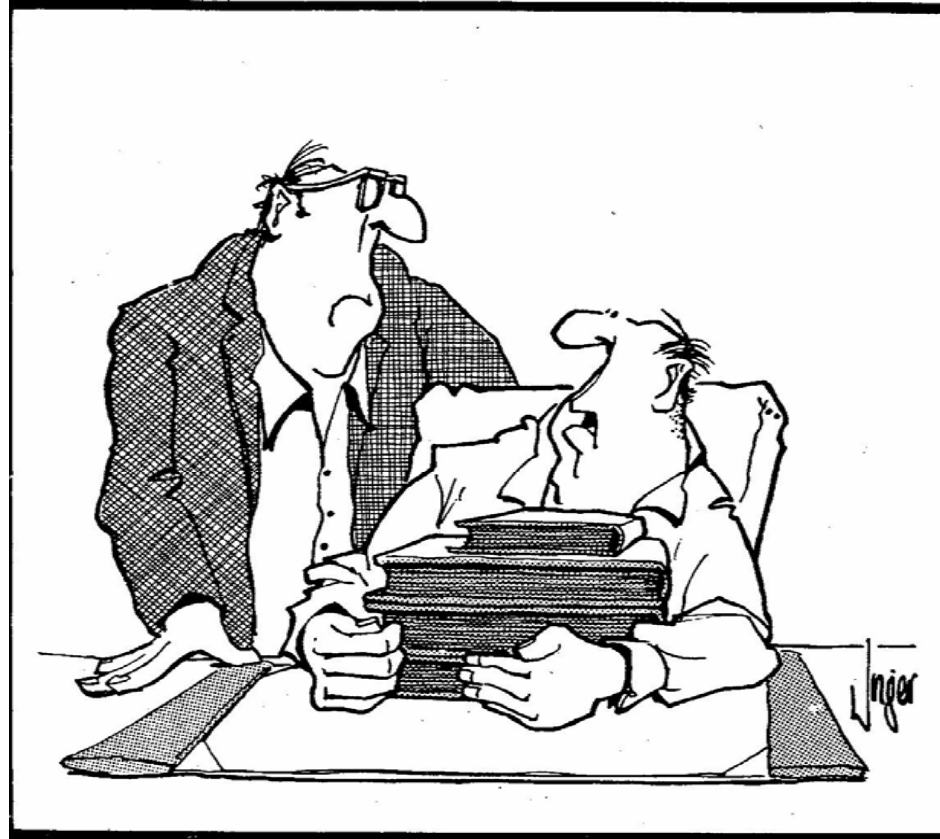
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“Start? Start what? I thought you said you hired me to take care of the books.”



Budget: What is it?

- “A list of planned expenses and revenues”
(Wikipedia)
- A **plan** for how to spend resources in support of your objectives
- budget = actual



Budget: Why put us through this pain?

- Promotes Planning, prioritizing
- Ensures due diligence: verifies that plan is reasonable
- Accountability: provides a measuring stick



Source of Budget

- Increased central funding
- Re-allocation of resource
- Revenue generation



Budget Practices Influence Behaviour

- Can't keep surplus...

SPEND

- Must cover deficit out of next year's budget...

NO DEFICIT

- Unspent budget reduces future budget...

SPEND

- Successful revenue generation is matched by budget removal...

WHY BOTHER?



Top 10 Tips to win at Budget



Rule #10 : Demonstrate Fairness

- Identify, implement and brag cost savings
 - E-receipting removed \$xxx postage costs
 - Reduced travel cost / meeting
- Reduce budget area when appropriate
 - ...or at least do more with the same



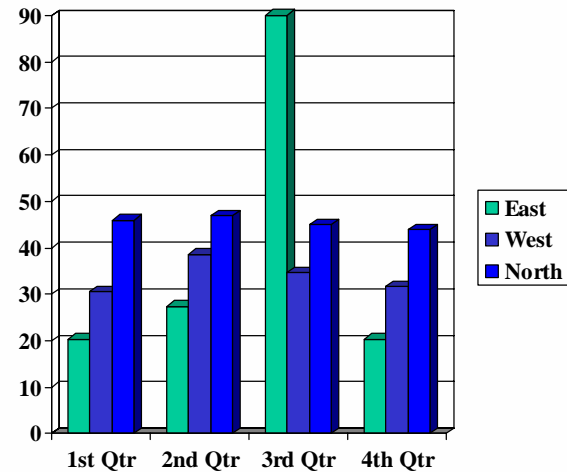
Rule #9 : Know the Process and Work it!

- Decide when to identify potential revenue options
- Understand the decision process
 - % of requests?
 - % of new resources available?
 - Who decides?



Rule #8 : Communicate with your audience

- Numbers people: facts, spreadsheets, charts
- Colour, charts, graphs
- Word descriptions





Clarify their Focus..

- Bus. Cards \$150
- Office Supplies \$40
- Paper \$200
- Photocopy charge increase \$375
- Postage Increase \$2,000
- Campaign Launch Events \$147,700
- Increase Costs for postage & office \$3,000
- Campaign Launch: London, Toronto, NYC \$150,000 (detail attached)



Rule #7 : Link your request to objectives

- Improve service
- Increase revenue
- Maintain/enhance performance stats
- Beat/meet industry standard
- Sustainability/long term focus





Rule #6 :Find a Champion(s)

- Enlist your volunteer leadership
 - Advancement Committee
 - Board members
- Internal Champions can make your case
 - Finance
 - Deans





Rule #5 : Validate your request

- Statistics, Results
 - Know the details
 - % of total budget
 - Budget/year vs volume
 - # staff
 - Cost/dollar raised
 - % Operating vs salary budget



Rule #5 : Validate, cont'd

- Industry Standards
- Best Practices
- External Validation



Rule #4 : Use Your Tools

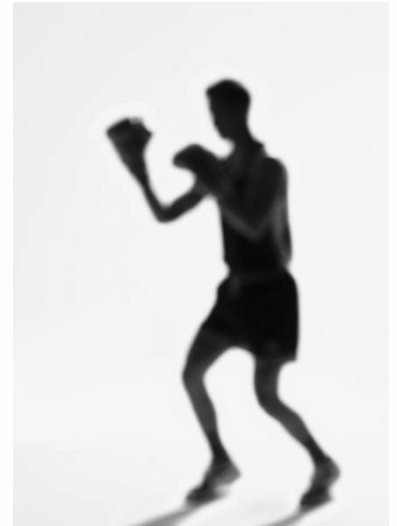
- Benchmark against other areas:
 - Benchmark as % of overall budget
 - X gifts per processor
- Collect measurable information
 - # gifts processed
 - # system users
 - # helpdesk requests; avg time to complete





Rule #3 : Defend your ask...

- 3 cities: London UK, NYC, Toronto
- \$50,000 per city, on average
- Includes costs such as travel, venue, promotion
- Projected cost: \$150,000





Defend your ask

Campaign Launch Events

	NYC	Toronto	UK	Total
# guests expected	75	200	50	
Venue	2,000	1,000	donated	3,000
Food and Beverage (\$50/)	3,750	10,000	2,500	16,250
Travel - 6 people	3,000	1,200	12,000	16,200
Hotel - 6 for 2 nights	6,000	1,800	7,200	15,000
Entertainment	5,000	donated	7,000	12,000
Advertising	25,000	15,000	30,000	70,000
Takeaway Gifts @ \$10	750	2,000	500	3,250
Multi-media	4,000	4,000	4,000	12,000
	49,500	35,000	63,200	147,700
				147,700



Rule #2 :Ease their pain

- Demand vs supply
- Unlimited initiatives to support
- Need to be able to defend budget request to their superiors
- Keep his/her team happy
- Finding the money!



The President's Dilemma: New Database vs New Faculty

Better information



Improve long term relationship abilities



Raise more money



Pay for more faculty in long term



Rule #1 : KISS

- Simplify your presentation
- Clear, precise information
- Use graphs





Questions?



Thank You!

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