

Course Number & Name: LIS 676 – Leadership in Financial Management for Library and Information Services

Description: This course provides an overview of financial management for libraries, information-related organizations, and projects within the context of identified leadership values. The topics of planning, implementing and reporting on budgets, financial management measures, internal and external communications, partnering, stewardship, and integrity are all issues that are discussed relative to the desired outcomes of institutional accountability, credibility, and trust.

- **Prerequisites:** LIS 671 – Managerial Leadership
- **Audience (level, environment/setting):** beginning PhD; all settings
- **Student Learning Outcomes:** (see models document for definitions of leadership competencies – www.simmons.edu/gslis/phdmlip/program)
 - financial skills
 - LIS domain knowledge
 - accountability
 - performance measurement
- **Topics:**
 - accountability
 - strategic planning
 - budgeting
 - procurement
 - revenue streams
 - salaries and benefits
 - operating expenditures
 - reporting
 - risk management
 - legal issues
 - audits and standards
 - pensions and investments
 - fiscal management in competitive environments
- **Suggested Textbooks/Readings:**
 - Abraham, A. (2006). Financial management in the nonprofit sector: A mission-based approach to ratio analysis in membership organizations. *Journal of American Academy of Business*, 10(1), 212-217.
 - Cavill, P. (2001). Advocacy: How does it differ from public relations and marketing? *Feliciter*, 47(2), 90-93.
 - Curzon, S. C. (2003). Budget shortfalls. *Library Journal*, 128(9), 34-5.
 - Martin, S.K. (1998). The changing role of the library director: Fund-raising and the academic library. *The Journal of Academic Librarianship*. 24, 3-10.
 - Robinson, B.M., & Robinson, S. (1994). Strategic planning and program budgeting for libraries. *Library Trends*, 42, 420-447.
 - Supported by readings from the current literature.