

## The Personal Cost of Small Budgets & Underfunded Libraries: Out-of-Pocket Spending by School Librarians during COVID-19

[Jenna Kammer, PhD](#), Associate Professor, University of Central Missouri, Warrensburg, Missouri

Charlene Atkins, PhD, Associate Professor, University of Central Missouri, Warrensburg, Missouri

Rene Burress, PhD, Associate Professor, University of Central Missouri, Warrensburg, Missouri

### Abstract

*This study examined how school librarians spent their own money to support their libraries during the 2020–2021 school year in the context of the COVID-19 pandemic and the various factors that influence this spending. Using mixed methods, this study identified demographic information about the participants and schools served, personal spending practices, perspectives on the need for personal spending, and local school policies related to library funding that impacted out-of-pocket spending. The major findings of this study indicate that school librarians used their own money to purchase books, decorations, prizes, office supplies, and cleaning supplies. Librarians used their own money to meet student needs, to get what was needed quickly and conveniently, to obtain items for which they were not allowed to spend school money, and to avoid dealing with time-consuming purchasing and reimbursement processes—if reimbursement was even an option. School librarians also spent their own money because library budgets were eliminated, reduced, or frozen during the pandemic. In addition, school librarians who spent the most of their own money worked in rural areas with a higher proportion of students who qualify for free/reduced lunch. School librarians who were over 60, unmarried, or had lower library budgets spent more of their own money on their libraries than did other study participants.*

## Introduction

This study examined how school librarians spent their own money to support their libraries and students during the 2020–2021 school year in the context of the COVID-19 pandemic. While few previous studies related to out-of-pocket spending by school librarians for their library exist, there is ample evidence that educators in general spend their own money on their work due to lack of adequate budgets and funding (García & Engdahl, 2019; National Center for Educational Statistics, 2017). For example, in 2018 the National Education Association conducted a campaign to ask teachers to share their #OutOFMYPocket stories and concluded that teachers purchase school supplies, books, food, and more for their classrooms (Walker, 2018). In more recent news, teachers made headlines when they “dashed for cash” at a hockey game in South Dakota so that they could gather cash to pay for school supplies and programs (Treisman, 2021). Educators’ use of personal money to pay for supplies was particularly relevant during the COVID-19 pandemic as new routines, processes, and practices emerged within many school libraries while budgets were reduced and guidelines relating to health and safety were expanded for schools (Santos, 2020). In this study we sought to understand more about what school librarians spend their own money on to support their libraries, while also identifying issues that can lead to increased out-of-pocket costs.

## Background

During the COVID-19 pandemic—especially the first twelve months—school librarians experienced significant disruption related to their normal procedures (Kammer & Burrell, 2020; Morris & Kammer, 2021). Morris and Kammer (2021) found that librarians who served teens described in their blogs how dispositions of adaptation and flexibility were needed to continue to provide services, instruction, and resources to students who may be learning at a distance, in a hybrid model, or simply unable to visit the library due to COVID-19 protocols in the school. In addition, the American Association of School Librarians (2020) found in a snapshot survey that as school librarians worked to support learners, these educators had limited resources, including insufficient funding for personal protective equipment, minimal technology or digital resources, and confusion about proper safety protocols for libraries. In addition, the number of school librarians reporting that their budgets decreased during the 2020–2021 school year increased by 38% (Kletter, 2021).

Educators in K–12 settings will find creative ways to make up for reduced (or lack of) funding, often paying for supplies with their own money. In 2020 the Huffington Post published an article about teachers who spent their own personal money to provide personal protective equipment for their students and themselves within the classroom. In this article Bond explained that teachers were not provided with resources needed to sanitize the classroom space, nor were they necessarily given additional resources to support teaching and learning in new virtual formats. To address this, many teachers purchased what they needed with their own money (Bond, 2020). School librarians, who are also teachers, face similar budget challenges in that they have limited and reduced budgets with which to purchase books, furniture, supplies, and other needs for their

school libraries. In 2020 school librarians reported having to reallocate 6% of their budgets to COVID-19 supplies (AASL, 2020).

While news and spending reports have examined out-of-pocket spending in schools, little peer-reviewed research has been conducted to understand more about the details of this spending and the variances in out-of-pocket spending in the context of socioeconomic factors. The limited attention focused specifically on school librarians' out-of-pocket spending led us to design this study to explore how school librarians spent their own money during a school year within the COVID-19 pandemic amid the non-traditional schooling formats that resulted from school closures and remote learning. We sought to understand what school librarians spent their own money on, why they felt that they needed to do this, and what specifically impacted their need to use their own personal money to support teaching and learning. This study used a mixed-methods approach to understand this phenomenon and is one of the only empirical studies to explore the out-of-pocket spending by school librarians to fund their libraries or provide for students' needs.

## Research Questions

This mixed-methods study was guided by the following research questions:

1. How did school librarians spend their own money on their libraries during the 2020–2021 school year?
2. Why do school librarians spend their own money for job-related expenses?
3. What factors impact increased out-of-pocket expenses for school librarians?

## Literature Review

### Out-of-Pocket Job Expenses

The phrase *out-of-pocket expenses* is operationally defined for this paper as work-related purchases made by school librarians with personal money that may or may not be reimbursable later. Research related to work and spending centers around money and happiness (Aknin et al., 2020; Dunn et al., 2014), or business expenses, which are related to how businesses spend money for their employees (Bartik et al., 2020). Few professions have discussed employees' out-of-pocket expenses as a concern, though an example of informal survey data from the field of science found that the greatest out-of-pocket expense for scientists was coffee while traveling (Handee, 2019). However, within the field of education, a body of work exists related to the phenomenon of teachers and school librarians spending their own money to provide for their students, classrooms, and school libraries (Kletter, 2021; Latham & Fifield, 1993; Olszewski & Maury, 1994; Resh & Xu, 2014).

Several seminal studies highlighted the issue of out-of-pocket spending by teachers and school librarians to support their work due to inadequate budgets for classroom supplies. In the early

1990s Latham and Fifield (1993) surveyed teachers in western states and found that they were spending an average of \$444 a year of their own money on classroom supplies. Several years later, Olszewski and Maury (1994) explained how teachers spent money from their own salaries because they are pressured by society to prove themselves, improve instructional practices, and help students who are in need. Olszewski and Maury found teachers spent per year an average of \$492 of their own money on their classrooms and students (an estimate of \$23 million dollars in personal teacher contributions each year). Kletter (2021) surveyed 21,000 school librarians for the *School Library Journal* spending survey in the fall of 2020 and found that 75% of respondents spent their own money on library books, supplies, and prizes.

Some evidence shows that spending money on others increases happiness. Dunn et al. (2014) explained that the way people spend their money is just as important to their happiness as having money. In their study, Dunn et al. found that giving money, donations, or gifts to, or on behalf of, other people provided more individual positive effects than having more money or spending it on themselves. Spending money on others is also considered prosocial spending and has been found to increase happiness, if only momentarily (Aknin et al., 2020).

In some cases, administrators may not approve of spending budget money on certain expenses for classrooms, including purchases of rewards, decorations, or other items needed to improve the classroom, leading teachers to purchase these items with their own money (Zalud et al., 1995). In 1995 Zalud et al. surveyed 100 elementary school teachers in South Dakota, Iowa, and Nebraska to identify what they purchased with their own money and how much they spent. Those researchers found that 93% of teachers surveyed spent between \$5 and \$470 of their own money for materials to enhance teaching and to address inadequacies in the budget. Resh and Xu (2014) found that the more autonomy teachers had to make their own choices about allocating resources for their classrooms, the less out-of-pocket spending they do. Resh and Xu concluded that teachers are more likely to spend their own money when they have less autonomy over purchasing resources and will likely use their own money to pay for items that help them to complete immediate tasks in their preferred method.

## School Library Budgets

Public school budget money comes from a combination of local, state, and federal tax dollars. School districts use many different types of budgets, but the two most common are centralized and decentralized budgets. These budgets provide different levels of autonomy for educators and administrators at the building level.

Centralized budgeting in school districts means the superintendent and a few district-level employees control the district finances. This method allows the district to control costs, facilitates buying in bulk (sometimes with cost savings), and promotes efficiency in overall operations. It also frees up school leaders to focus on faculty and students rather than school budgets (Wilkins, 2020). For school libraries and school librarians, this type of budgeting can mean a district library coordinator can fund libraries equitably based on school size and other factors—or it could mean no libraries and no budget.

Decentralized budgeting empowers school leaders and even classroom teachers to make building-based decisions about budgetary spending (Rennie Center for Research and Policy, 2012). This type of budgeting allows for the alignment of resources purchased with building-based goals. It encourages data-driven decisions to best support goals and can lead to improvement in student achievement. For school libraries and librarians, this type of budgeting relies heavily on the school principal's support of the school library program. Therefore, a strong relationship between the school librarian and the school principal is beneficial in this situation. In schools where the principal changes frequently, or the school principal does not value the role of the school library and school librarian, decentralized budgeting can also bring frequent and unpredictable budget changes depending on the value the current principal places on the library program. School librarians in this situation may need to do a lot of advocacy for their programs and collections to get funding. (Suggestions for advocacy are in the "Implications for Practice" subsection of this paper.)

To supplement budgets, other funding sources for schools and libraries are also available: grants, fundraising, and educators' personal spending. Cuillier and Stoffle (2011) explained that libraries (particularly academic libraries) with reduced budgets can look for funding from other sources of revenue, such as fundraising, annual campaigns, capital campaigns, friends groups, gifts, endowments and planned giving, grants, joint ventures with athletics, and money-making efforts (e-commerce, cafes, for-credit courses, advertising, rights and reproductions, fee-based services, user fees, and student fees).

## Method

This study used a convergence mixed-methods design to gather exploratory data on perspectives, details, and artifacts related to how school librarians spent their own money during the 2020–2021 school year in the context of the COVID-19 pandemic. This design allowed researchers to simultaneously examine quantitative and qualitative data to merge the results and identify specific policies that impacted the results. Plano Clark and Ivankova (2016) described how intersecting mixed methods can trigger the emergence of different views, which can advance the needs of respondents to begin to highlight specific issues and enact calls for change.

## Setting

The setting for this research took place on the LM-NET listserv, <http://www.lm-net.info/>. The LM-NET listserv is self-described as an e-mail list for "everyone with an interest in school library media topics." According to the "About" page at the LM-NET website, this listserv began in 1992 and has over 12,000 members from 64 countries. Using this listserv as a research setting allowed us to seek responses from a broad range of school library professionals in many geographic areas for the purpose of generally understanding more about the issue of school librarians spending their own money on their libraries. Specifically, this listserv allowed us to

seek a wide range of responses by accessing a group of school librarians who are not part of a single professional association.

## Sample

The respondents in this study include school librarians who subscribe to the LM-NET listserv. Seventy respondents chose to respond to the survey after a general post was made to the listserv, and all were included in the sample. Of these responses, twenty-three shared specific policies of their choice that impact their need to spend their own money, which included emails describing the policy, links to policies online in school documentation, or documents sent to educational staff. Sixty-four of the respondents responded to all quantitative questions. All respondents formally consented to participate in the study; the consent form was approved by the Human Subjects Committee of the Institutional Review Board at the University of Central Missouri.

## Data Collection Methodology

The survey (see Appendix A) was adapted for this study from prior work that examined teacher personal expenses (Resh & Zu, 2014; Walker, 2018; Zalud et al., 1995). The survey development was an iterative process, and five school librarians provided feedback on the draft questions and then tested the final survey. The pilot group of school librarians identified wording confusion, questions they felt were too personal, and gaps related to relevant content that could be added to the survey. All feedback was integrated into the final survey so that the questions would apply to a broad audience of school librarians. The final survey included three sections: out-of-pocket spending, school characteristics, and respondent demographics. Questions were designed to gather exploratory data, including demographic information about the participants and schools served, personal spending practices, perspectives on personal spending practices, and local school policies related to funding. The final survey was then shared on the listserv in May 2021. A survey reminder was sent two weeks later.

Respondents were also asked to share specific policies that impact their ability to fundraise or spend their own money. Participants shared these policies within the survey, or by following up with an e-mail to share the policy. Once the survey results were analyzed, these policies were reviewed to identify the types of policies that could impact spending by participants.

## Data Analysis Methodology

Contingency table analysis, often referred to as cross-tabulation analysis, allows the researcher to analyze the relationship between two variables simultaneously (Hawkes, 2019). Contingency table analysis was used to compare specific variables with the dollar amount of personal spending reported by participants. Respondents were also asked to elaborate on why or how they spent their personal money. A contextualizing strategy was used to interpret narrative data (Teddlie & Tashakkori, 2009). First, NVivo qualitative data analysis software was used to

conduct a word query. Further analysis, based on the query results, led to the identification of noticeable categories and themes, and codes were then assigned to these regularities in responses. Codes were then used to condense responses and summarize the findings.

## Results

### Demographic Information

Respondents did not respond to all survey questions and the reason for this is unknown.

#### Gender

Respondents were asked to identify their gender and given the option of selecting or writing in a response. Of the 70 respondents who provided a response for gender identity, 92.8% indicated identifying as a woman or being female, 4.3% identified as a man or being a male, and 2.9% preferred not to respond to this question.

#### Age

Sixty-nine respondents indicated the range of their age. Of these, 33.3% represented ages 41 to 50 years old, 27.5% represented ages 51 to 60 years old, 20.3% represented ages 61 and older, 15.9% represented ages 31 to 40 years old. Only 1.4% of respondents were under the age of 30 and the remaining 1.4% preferred not to answer.

#### Race and Ethnicity

Sixty-nine respondents selected their ethnicity. Participants were able to select as many as applied. Of these, 89.9% selected Caucasian, 1.4% selected Caucasian and Native American, 1.4% selected Black or African-American, 1.4% selected Latino or Hispanic, and 1.4% selected Asian.

#### Marital Status and Dependents

Of the 68 respondents who responded to questions related to marital status and dependents, 72.1% indicated that they were married while 23.5% indicated they were not married, and 4.4% preferred not to disclose this information. Of the respondents, 44.1% indicated that they had 1 or 2 dependents, 35.3% had no dependents, 10.3% had 3 or 4 dependents, 1.5% had five or more dependents, and 8.8% preferred not to disclose this information.

#### Level of Education

Sixty-nine respondents indicated their highest degree or level of education. Of these, 73.9% held a master-level degree while 15.9% indicated having a post-master-level degree (i.e., Doctoral Degree, Education Specialist, Juris Doctor, etc.). A bachelor's degree was the highest earned by 8.7% of respondents. Only 1.4% indicated that the highest level of education reached was a high school diploma.

### Job and School Categories

Approximately 95.6% of the 70 respondents indicated that they were employed full-time as a school librarian (including those who self-described as teacher librarians or library media specialists), 2.9% as a school library assistant or paraprofessional, and 1.4% were employed as a district media specialist and classroom teacher. In addition, 2.9% were retired, and 1.5% were part-time.

Of the 70 respondents, 77.1% indicated that they are employed in a traditional public school while 14.3% indicated that they were employed in a private school. Charter schools, Title One public schools, neighborhood magnet K–5 and traditional magnet 6–8 schools, Montessori schools, international schools, and private for-profit schools were each represented by 1.4% of respondents.

When asked about years of service, 64.3% reported serving as a librarian for 10 or more years, 12.9% had served 7 to 9 years, 11.4% had served only 1 to 3 years, 8.6% had served 4 to 6 years, and 2.9% were in their first year of service.

### Income and Salary

Regarding income, 69 respondents shared their level of household income. Of these 69 respondents, 36.2% indicated a household income of \$50,000 to \$99,999, while 27.5% indicated \$100,000 to \$199,999. Those earning more than \$200,000 were represented by 14.5% while 4.3% reported a household income of \$25,000 to \$49,999. Some respondents (17.4%) preferred not to disclose their household income.

Seventy respondents provided information regarding their school librarian salary. Of these 70 respondents, 35.7% earned \$60,000 to \$79,999, 22.9% earned \$40,000 to \$59,999, 18.6% earned \$80,000 to \$99,999, and 11.4% earned \$20,000 to \$39,999. Outliers included 2.9% who earned \$50,000 to \$99,000, 2.9% who reported earning less than \$20,000, and one respondent (1.4%) reported earning \$100,000 to \$199,999. Three respondents (4.3%) preferred not to disclose income information.

### School Size, Student Eligibility for Free/Reduced Lunch, and Locations

Sixty-nine participants responded to questions regarding school enrollment, and students' eligibility for free and reduced lunch. Schools with 300 to 499 students enrolled were represented by 34.8% of respondents. Enrollment of 700 to 999 were represented by 17.4% of respondents while 15.9% represented schools with enrollment of 500 to 699 and 15.9% with 1,000 or more students. Smaller schools, with enrollment of 100 to 299, were represented by 14.5%. Schools with less than 100 students were represented by only one respondent (1.4%).

Twenty-six percent of respondents indicated that their school had 75% or more students approved for free or reduced lunch programs followed by 21.7% of respondents indicating that 25% to 49% of students were approved for these programs. Approximately 20% respondents indicated that 0% to 24% of students were approved, 17.4% respondents indicated 50% to 74%



of students were approved. Only 7.2% of respondents indicated that free or reduced lunch programs did not apply to their school, and 7.2% were unsure.

The majority of respondents (95.7%) indicated being located in North America while 2.9% were from Europe, and 1.4% from the Pacific Islands. Of those living in the United States, 42.2% were from the Midwest region, 28.1% from the northeast region, 10.9% from the southeast region, 10.9% from the southwest region, and 7.8% from the west.

All 70 respondents answered the question about community type. Suburban communities were represented by 37.1% of respondents, while 24.3% were from rural communities, 24.3% from cities, and 14.3% from towns.

## Quantitative Data about Out-of-Pocket Spending

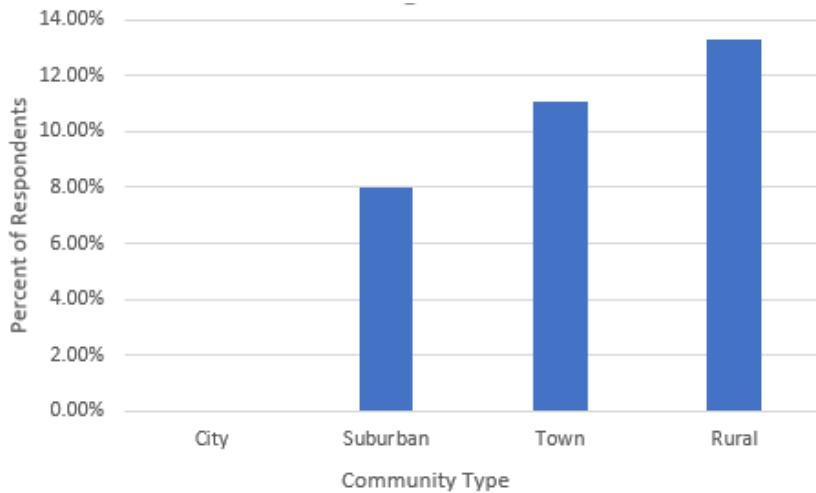
Respondents were asked to indicate the approximate amount of out-of-pocket money spent by selecting from provided answer choices. Of the 64 respondents who responded to all questions in Section 1 of the survey relating to dollars spent, most (96.9%) indicated that they spent personal out-of-pocket funds on school library needs. Of the total respondents, 32.8% indicated that they spent between \$100 and \$299 in a year (see Figure 1).

Figure 1  
*Annual Personal Spending of Respondents*



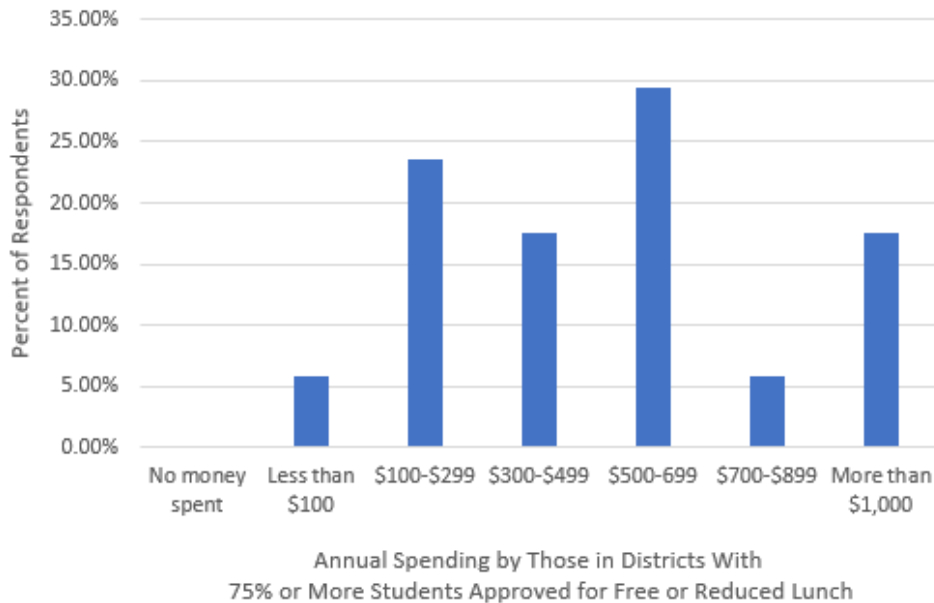
This was nearly twice the response rate of the next highest frequency, which was \$300 and \$499. It was noted that 13.3% of respondents from rural districts and 11.1% of those from towns spent more than \$1,000 while only 8% of respondents from suburban districts spent this amount, and no respondents from larger cities reported spending more than \$1,000 (see Figure 2).

Figure 2  
Community Type of Respondents Spending over \$1000



The two respondents who indicated that they had spent no personal out-of-pocket money during the 2020–2021 school year also reported serving in districts with 0% to 24% of students on free or reduced lunch programs. However, more than half (52.9%) of respondents in schools with 75% or more students on free or reduced lunch programs indicated spending more than \$500 out-of-pocket (see Figure 3). No trends were noted regarding district enrollment size or grade bands.

Figure 3  
Out-of-Pocket Spending by Respondents with 75% or More Students Approved for Free and Reduced Lunch



Approximately 37.5% of unmarried respondents reported spending \$500 or more, while only 26.7% of married respondents had spent that much. It was also found that approximately 16.7%

of respondents over the age of 60 indicated spending more than \$1,000. No statistically significant findings related to librarian salaries were found. However, responses by household income did reveal differences. Approximately 66.7% of respondents with household incomes of \$25,000 to \$49,999 spent \$500 or more while only 29.2% of respondents with household incomes of \$50,000 to \$99,999 spent this amount. It was found that 27.8% of respondents with household incomes of \$100,000 to \$199,999 spent \$500 or more while only 22.2% of respondents with household incomes of more than \$200,000 spent this amount.

While examining responses related to district budgets, it was found that 14.3% of respondents with a budget of \$1,000 to \$5,000 reported spending more than \$1,000. In contrast, 27.7% of those with greater budgets of \$5,000 to \$10,000 and 75% of those with budgets of \$10,000 to \$15,000 spent less than \$100 out-of-pocket.

In addition to questions regarding the amount of money spent, respondents were also asked to indicate how they spent their personal money. All 70 respondents responded to survey questions related to items purchased with personal funds (see Figure 4). Of the respondents, 65.7% reported spending personal funds to purchase books for student use. Other frequent purchases included library decorations (48.6%), prizes for students (48.6%), office supplies (42.9%), cleaning supplies (42.9%), arts and crafts supplies (40%), and technology, apps or learning resources (29%).

Figure 4

*Most Frequent Purchases Reported*



Respondents were asked to identify their out-of-pocket spending on professional development expenses. Respondents (60%) also indicated spending personal funds on professional association membership dues. In addition, they indicated that they spent their own money on conferences (27.1%), workshops (24.3%), books for professional development (31.4%), teaching resources (31.4%). Of those who responded, 29% also indicated that they did not spend their own money on professional development this year.

Respondents were asked what other options they use to fund purchases, besides spending their own money. Of the 64 who responded to this question, 57.8% said they use grants, 54.7% use fundraisers, and 53.1% use donations. Respondents were able to write in additional ways that they fund their library and these responses included book fairs, gift book programming, scholastic dollars, fines for lost books, and book sales.

## Qualitative Data

All respondents were asked open-ended questions and invited to share personal experiences in e-mail to allow them to elaborate on their experiences of spending their own money for work. These responses were coded and analyzed for emerging themes and paired with school-level policies as identified in the findings (see Table 1). The following results are arranged by themes which emerged throughout the data.

Table 1  
*Categories and Themes*

Categories	Themes
a.) Budget was restricted, frozen, reduced and redistributed	I. Personal Spending Due to Inadequate Financial support
b.) Budgets are insufficient	
c.) Getting reimbursed is a long, complicated process	II. Personal Spending to Improve Efficiency
d.) Writing a purchase order is time-consuming and tedious	
e.) Spending personal money is faster and easier	
f.) Students needs arise that aren't budgeted for	III. Personal Spending to Meet Students' Needs
g.) School requirements were not funded	
h.) Restricted to use certain vendors	IV. Personal Spending Due to Restrictive Policies
i.) Restricted to making certain purchases or being reimbursed for certain purchases	
j.) Restricted from raising money	

### ***Theme I: Personal spending due to inadequate financial support***

The primary reason that respondents explained that they used their own money is because they did not have budgets that provided them with what they needed. During COVID-19, this could be because funding was frozen during the uncertainty of COVID-19 lockdowns (as one respondent said, “Because our budget was frozen and the items made my life day to day easier”), or because funding was reduced. Still, some indicated that they never have a school library budget. As one said, “No budget for the library,” and another said, “No district money available.” One respondent specifically stated that they spent their own money because: “We were not given a budget this year. At the beginning of the year no one was allowed to spend money.” One respondent is predicting a budget shortfall next year and said, “Next year there is a projected budget shortfall, so I stocked up on supplies to prepare.”

During COVID-19, respondents explained that those with budgets often had to redistribute them. For example, one said, “I usually never have to spend much. However, I had to use what budget [I] had to purchase digital books and a cart to travel. So... supplies I needed had to fall on me after my budget was gone.” Another explained that they “ran out of budgeted monies” so they had to spend their own money. Virtual learning also led to increased personal spending as school library budgets were not prepared to cover this. One respondent said, “We needed to get the research books we needed to add to students when they were fully remote during the 2020–2021 year” and four others explained that they spent more on technology than ever before: “Normally I spend money on books for the library (new or popular titles the students want); this year it was technology.”

One respondent provided advice to other school librarians about spending their own money because they are lacking support and said, “Don’t. In a female-dominated profession, it’s expected that we spend our own money for things. Science teachers don’t have to buy lab equipment out of their own pocket. I just don’t. If I can’t get it from the school or parent donations...it’s not happening.”

### ***Theme II: Personal spending to improve efficiency***

The respondents indicated that requesting a purchase order or reimbursement for items purchased quickly took a great deal of time, which they wanted to avoid. One respondent said, “If it’s not in the budget, then it cannot be purchased. Everything requires a P.O., even one to be reimbursed. The turnaround takes at least two weeks. I need things NOW.” Another said, “The requisition process often takes time, and I need an immediate purchase.”

Spending one’s own money was simply faster than requesting it from the school, or even requesting reimbursement from the school later. One respondent said, “I only spend out-of-pocket money when it is easier than awaiting a P.O. to be approved.” Another said, “I needed things more quickly than I could get them through the school.” Throughout all the data, over 30 codes were identified related to the efficiency of spending one’s own money to purchase items for the library.

### ***Theme III: Personal spending to meet students' needs***

Respondents selected what they spend their personal money on from a series of choices listed in the survey (choices identified in the literature), such as books, cleaning supplies, decorations, etc. However, they were able to write in specific expenses that were not included in our preselected categories. Almost all the write-in answers included items to support student needs, including paying student fines, providing them with yearbooks or other resources, or to provide fun and engaging activities for the students. One respondent explained this by saying, “To make the library program a success. I needed the students to have the materials to complete the learning objectives.”

This study took place during the COVID-19 pandemic, and respondents were asked to specifically explain how spending was different during the pandemic. Thirteen respondents indicated that they spent more of their personal money on cleaning supplies than they had in the past, with several describing how this was part of keeping the library safe for students and staff. For example, two respondents explained that they needed to purchase additional supplies so that students would not have to share, which would keep them safer. They said, “Because of COVID restrictions, I was not able to purchase any shared supplies. Each student had to have their own,” and “[I spent] more this year and needed more crayons, etc. because nothing could be shared.” Still another said, “Since we were concerned about cross contamination, more supplies were needed because they couldn’t be sanitized between classes or needed to be quarantined for days.”

For some, COVID-19 restrictions led to less personal spending. One respondent said, “Part of the time the school was closed due to COVID, so there were fewer items needed to be purchased, e.g., library decorations as I did not do many displays.” Another said they spent less money this year because “I didn’t have as many f2f teaching opportunities and didn’t need ‘props,’ reading incentives, or decorations like I’ve needed before.”

### ***Theme IV: Personal spending because of restrictive policies***

In this survey the respondents were asked specifically which policies impacted how much of their own money was spent on their libraries. The policies that impacted out-of-pocket spending included: reimbursement policies, purchasing only from district-approved vendors, donation policies, fundraising policies, and requisition policies. While 23 respondents answered that there were not any policies that restricted or led to reasons they had to spend their own money, others indicated that they spent their own money because of policies within their school that restricted how they were reimbursed or what they were reimbursed for. For example, respondents said, “Can only be reimbursed from petty cash under \$25,” “Not reimbursed unless have approved P.O.,” and “Must have purchase order, no petty cash or reimbursement.” Supplies such as prizes, decorations, cleaning or office supplies are purchased from stores that typically don’t accept purchase orders.

Another policy restriction that led to out-of-pocket spending was the requirement to purchase from certain vendors. One respondent said, “I cannot use library funds to order from Amazon. I cannot ask for petty cash to shop in craft supply stores, grocery stores, etc.” Another said, “Some items can’t be purchased from our district’s vendors. I purchase decorations during the summer

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when school is out, and my school money is gone. I buy craft/STEM supplies as needed throughout the year for certain activities that go along with certain books.”

Others said they were limited in what they were allowed to purchase with school funds, and if they wanted something else, they had to purchase it on their own. In one example, a respondent said, “They only allowed a specific cleaner that was not compatible with technology or library materials.” Another said that they purchase prizes for students because “Instructional funds cannot be spent on prizes and incentives for students.”

Several respondents indicated that they are restricted from earning or raising money to supplement library budgets. Specifically, one said they were “not allowed to use resources such as GoFundMe, etc.” Similarly, another said the only restrictions they have is “if we request monies from other sources (i.e., DonorsChoose, grants)” which also suggests that this librarian is unable to seek funding from outside sources. To accommodate this, several indicated they supply their own items from home, or loan personal items to the library. One respondent said, “We have spending caps that mean I could not supply high-dollar items unless I got approval. I do not have the funds to provide these anyway. Often, more-expensive items are borrowed ‘from home’ and brought back home at the end of the year.”

## Discussion

This study confirmed common knowledge within the field that school librarians spend their own money to successfully run their libraries due to constraints such as lack of resources, heavy workloads, and inflexible financial policies. Lipsky (2010, 2013) might describe school librarians as street-level bureaucrats (like teachers, police officers, and social workers), who create policy through daily interactions with the public, while also using professional discretion to respond to real-life challenges when working with the people they serve.

The COVID-19 crisis created unprecedented challenges for school librarians. Many of these challenges could not have been predicted when budgets were created prior to the school year. In addition, school librarians experienced work pressures (such as reduced resources) that accompanied public policy (such as remote learning, and health and safety protocols) and found ways to cope, a practice common when policy is implemented requiring workers to do their job differently, but workers are not provided training needed to meet the policy (Hill, 2003). School librarians working during COVID-19 continued to provide access, choice, and instruction to students in various learning conditions, thus playing an essential role in enforcing school and public policy. Prior to the COVID-19 crisis school librarians already had many challenges that made doing their jobs difficult: large class sizes, inadequate funding, low salaries, accountability for meeting standards despite insufficient resources and time, and increasing administrative red tape (Goldstein, 2008; Oberfield 2019; Summers & Semrud-Clikeman, 2000; Taylor, 2007).

Our findings confirm that school librarians strove to continue to provide for their students and enact their roles in support of the library mission during COVID-19, even when they lacked basic necessities, cleaning supplies, and technology needed to do so. Many of the librarians in

this study compensated for these required resources by using their own money to provide what their school did not. Our data also begs us to question if school librarians were part of the district's COVID-19 planning committees, as many school librarians indicated their out-of-pocket spending was due to needing items outside of planned budgets.

## Personal Spending by School Librarians

We found that all but two respondents spent some of their personal money, most frequently spending between \$100 and \$299. The school librarians in our study spent their own money on books, decorations, office supplies, and cleaning supplies. Our findings parallel those of Zalud et al. (1995), who found that teachers used their own money to purchase items for the classroom that directly impacted instruction, but also purchased items their administrators may not approve using the budget for, such as decorations, prizes, or other classroom supplies. In addition, school librarians used their own money for what Aknin et al. (2020) might describe as prosocial reasons: paying for yearbooks for those who could not afford their own, paying fines for those who had lost books, and facilitating fundraisers for the library that require startup costs.

About one third of the school librarians indicated that they spent more than normal on their school libraries during the 2020–2021 school year because of the pandemic. Those that reported spending more on cleaning supplies (including personal protective equipment and sanitizing products) and purchasing additional items so that students would not have to share. They spent their own money to fill gaps identified in support of remote learning, such as virtual teaching tools or digital books. Also, using more of the budget money than usual to purchase digital resources left less to pay for traditional resources and supplies, which some respondents paid for themselves. This spending paralleled a finding reported by Morris and Kammer (2021) who found that school librarians were adaptive and resilient to responding to the needs of their school communities during the pandemic. Of those who spent less money than usual, many indicated this reduced spending of personal money was only because they had less instruction and interaction with students.

## Reasons School Librarians Spend their Own Money

Throughout the findings, it was evident that the main reasons librarians spend their own money is because to do their jobs effectively they need things outside of what their school library budgets allow. This shortfall can be because their budgets were low to begin with, or their budgets were frozen during the pandemic. In addition, many budgets have restrictions, such as lack of flexibility that would allow school librarians to move around allocations during the pandemic to cover new, unexpected costs. The results of our study supported the reality that low budgets are indeed a reason for school librarians' out-of-pocket spending on their libraries. We found that the respondents with the lowest school budget spend the most personal money on their libraries.

But low budgets do not account for all the reasons librarians were spending their own money. In addition, school librarians need items that are often not included within the budget, and,



therefore, choose to spend their own money to obtain those things that, in their professional judgement, are needed to support learners. Also, other school policies, in addition to restrictions on what can be purchased with school funds, impacted the need for school librarians to spend their own money. Among the policies that affected librarians' out-of-pocket spending were time-consuming processes or constraints for submitting purchase orders or reimbursement paperwork, and lack of options for raising money elsewhere. Similarly, Resh and Xu (2014) found that lack of autonomy over how teachers' budgets could be spent was one reason for increased out-of-pocket spending by educators. Further, our results indicate that the school librarians in this study found it easier to use their own money for small expenditures than to navigate administrative processes for reimbursement. However, many of the librarians recommended to others that they keep track of their out-of-pocket spending because spending personal money can be "a rabbit hole," that is, educators can easily spend more than they realize, or they can become stuck in a cycle of personal spending outside of the library budget.

While COVID-19 relief funds were provided to many schools, this funding either did not get to the library (which does not always receive the same funding as classrooms), or not enough funding was allocated to cover the supplies needed to keep students safe—and learning—in the library. Therefore, in addition to purchases related to typical library activities, such as buying books for learners, buying library decorations to improve the library, arts and crafts supplies for instructional support, and incentives to use with the students, during the 2020–2021 school year school librarians used significant amounts of their own money to create safe library spaces for the students by buying cleaning materials and buying enough supplies so students would not have to share. Aknin et al. (2020) described this type of spending as prosocial and explained how it leads to increased happiness and personal satisfaction. We cannot assume that the respondents in this study are happier because they spent their own money on their work because we didn't ask about happiness. However, it could be argued that they are more willing to spend their own money because of the direct benefit to the children with whom they work. However, this type of empathy has been found to lead to emotional labor and increased burnout, particularly for women in professions who are often expected to go above and beyond by providing time, money, and support for others in addition to their professional duties (Wróbel, 2013).

### ***Factors Correlated with Personal Spending***

Those who spent the most of their own money (more than \$500) tended to be in rural school districts and schools with 75% or more free and reduced lunch. They were also more likely to be unmarried, over 60 years old, and have a school library budget between \$1,000 and \$5,000 (an amount that is at the lower end of school budgets). This finding suggests that the increasingly low and reduced budgets for school libraries may lead to increased personal expenses for school librarians.

It was also interesting to note that those earning the lowest and the highest salaries spent approximately the same amount of their own money.

Enrollment, type of school, gender, degree, race and ethnicity, number of children, or geographic location and grade levels served did not play a significant role in how much respondents spent. The two respondents who did not have any out-of-pocket expenses had school library budgets of

more than \$15,000, were in traditional suburban public schools with less than 24% of students receiving free and reduced lunch and taught at the secondary level. Both respondents also had a household income of more than \$200,000.

COVID-19 and school closures were a factor related to personal spending for the respondents in this study. While many spent more money during the 2020–2021 school year to supplement the library budget, such as purchasing technology for virtual learning or supplies for creating safer library spaces, others spent less money. Some indicated they needed to spend less on student incentives and prizes because they saw students less than usual, while others indicated they spent more to try to make reading more enticing during virtual learning. Specifically, although several respondents indicated that they spent less of their personal money because they saw their students less and needed fewer supplies for students, even more respondents indicated that the pandemic led to increases in spending particularly for cleaning supplies, or necessary adaptations in their practices because of changes in policies. Kammer and Burress (2020) found that school librarians were experiencing many varied teaching and learning formats during the pandemic. That variation of experiences and practices was evident in the results of this study as well.

### *Implications for Practice*

Low salaries, combined with low school library budgets, are a problem that should be addressed in school districts. The findings in this study indicated a disconnect between library budgets provided by administration, and the extent of the expenses required to manage a library—especially under the special circumstances of a pandemic. These expenses include books, cleaning supplies, furniture, technology and e-resources, promotional items, and office supplies needed for the library program. If school librarians have control over the items requested in the budget, they should consider designating funds for these items.

Ideally, of course, the library budget would cover all costs of operating the school library to best serve learners, making personal spending on the library unnecessary. When advocating at the district and school level for a larger library budget, we recommend having a strategic plan for the school library that includes a mission and vision aligned to the school mission and vision. The plan should also contain goals and objectives that demonstrate how the school library will meet these goals to impact student achievement. If the plan accompanies a calendar of events and a proposed line-item budget, school librarians may have more success getting budget approval.

Another important element in working toward having an adequate budget is being aware of school board and district timelines for the budget process. Many school district budgets in the United States run from July 1 through June 30. Therefore, typically, school administrators work on their school budgets for the following school year in January and February, so that the budget can be approved by the school board in April or May. This lead time means that the school librarian should submit a budget request for the following school year as early as October of the current school year. Making the library's needs known early can also be helpful if the administrator ends up having extra money at the end of the current school year. In that case, the administrator can pull out the file the librarian provided earlier in the school year and see if there are purchases that can be made at the end of one school year for use in the next.

While planning this far ahead and gathering supporting data can be tedious, it can prove worth the time. For library events before, after, and during school hours, school librarians should keep detailed records of what exactly was purchased and also attendance lists that show who and how many attended. This information, as well as photos and videos of all student activities, can document the library effectiveness and be shared during the school year to remind stakeholders, including administrators, of the important role of the library. The information, photos, and videos can also be included in an end-of-the-school-year report about the school library. Even if the report is not required, creating and sharing a listing of lessons taught, and events outside the school day can be a powerful tool to advocate for a better library budget in the future, and also remind administrators of ways they can use discretionary funds to directly support learners. Including pictures and videos of teaching and events showing engaged student participants benefitting from resources funded by the current budget can be effective when included in such a report. While school librarians often want to feature circulation statistics in reports about the library, it is important to realize circulation may not have much meaning to a school administrator. The impact of circulation must be explained in such a way that it tells the school administrator specifically how the number of times a book has been checked out relates to student learning.

In addition to advocating for a larger budget, school librarians can also seek out (even in small communities), sponsors for special library events during the school day and after school. For example, if the library is hosting an afterschool reading club, the manager of a local grocery store could be asked to donate snacks. Likewise, a bank manager may have discretionary money to use to support local events such as an author visit. Offer to advertise these businesses as event sponsors and gain the benefit of less out-of-pocket spending for the librarian, plus more goodwill for the contributing businesses.

School librarians may want to keep track of their own personal expenses (supported by receipts) so they can claim available tax credits or deductions for educators (as some librarians indicated in their open-ended responses). They can also share a list of their personal expenses with administrators, even if they don't seek reimbursement, so that administrators can understand the costs of running a library and its needs unsupported by the current budget.

Providing school librarians with their own purchase ordering (P.O.) numbers or a purchasing card would alleviate some of the red tape that leads to school librarians spending their own money.

School library educators may wish to provide instruction or practice on strategic planning, grant writing, budgeting, and financial strategies to prepare school librarians for thriving in underfunded school libraries.

## Future Research

This study was conducted during the COVID-19 pandemic. However, the problem of school librarians spending their own money to fund their libraries existed prior to the COVID-19 pandemic. Future research on school librarians' personal spending outside of COVID-19-related

expenses and restrictions is needed. In addition, regional research would be useful to understand the impact of state-supported funding on school libraries, particularly those in rural areas, which often receive less money. Future research related to school library budgets and principals' understanding of the expenses of managing a school library program would be useful, as would additional research related to the allocation of school funding to the library in various budgetary models. Finally, none of the respondents mentioned COVID-19 relief funds in their responses. It begs the question as to how much school libraries received from COVID-19 relief monies or if library needs were included in school projects for which COVID-19 relief funds were sought. This study also uses a small sample of willing participants. Future research may wish to seek a larger, randomized sample.

## Conclusion

This study found that street-level bureaucracy (a term that refers to public workers, like teachers and librarians, using professional discretion to make the best decisions under prevailing circumstances to support the people they work with) drove many school librarians in this study to spend their own money on their libraries and on their students, particularly during a time of COVID-19 restrictions and protocols. Related to personal spending, the school librarians in this study used their own money to fill gaps within the library, including creating better and safer environments for students. In addition, the school librarians indicated that they encounter many policy restrictions related to spending money from the budget for the library. They often face limitations for what to buy, whom to buy from, and how and whether they can get reimbursed for purchases. The COVID-19 pandemic has led to changes for school librarians that impacted their budgets and, therefore, their need to spend their own money to support learners. However, spending their own money to support the library happened even before COVID-19. School librarians with smaller budgets are spending more of their own money to provide for students in their library. Librarians often spend their money on books, cleaning supplies, office supplies, decorations, and prizes because these expenses exceed what is in their library budget, and it is easier to spend their own money than request reimbursement or seek other funding.

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## Appendix A Survey

### Section 1: Out-of-Pocket Spending

During the 2020-2021 school year, approximately how much of your own money (USD) did you spend on supplies or materials for the library?

- A. None
- B. Less than \$100
- C. \$100-\$299
- D. \$300-\$499
- E. \$500-\$699
- F. \$700-\$899
- G. \$900-\$999
- H. more than \$1000

Did you spend more or less of your personal money on school library expenses during 2020-2021 as compared to what you might typically spend in previous years?

- A. More
- B. Less
- C. About the same
- D. Not applicable

What did you spend your own money on for the school library in 2020-2021? Select all that apply.

- A. Books
- B. Office supplies
- C. Arts and crafts supplies
- D. Library decorations
- E. Games
- F. Technology, app, or learning resources (including subscriptions)
- G. Media (audiobooks, ebooks, video, etc.)
- H. Furniture
- I. Prizes
- J. Student needs (clothes, food, toiletries, etc.)
- K. Cleaning supplies
- L. Other (please write in)
- M. I did not spend my own money during 2020-2021.



Describe the type of things that you bought with your own money for the school library in 2020-2021.

Why did you spend your own money on items for the school library?

What policies impact finding additional sources of funding for your school library?

What other professional expenses did you use your own money for in 2020-2021? Check all that apply.

- A. Conferences
- B. Workshops
- C. Professional development books or resources
- D. Professional association memberships
- E. Other (please write in)
- F. I did not spend my own money on professional expenses during 2020-2021

During the 2020-2021 school year, approximately how much of your own money (USD) did you spend on professional expenses?

- A. None
- B. Less than \$100
- C. \$100-\$299
- D. \$300-\$499
- E. \$500-\$699
- F. \$700-\$899
- G. \$900-\$999
- H. more than \$1000

Why did you spend your own money for professional development?

In what other ways, besides spending your own money, do you fund (or attain) purchases for the school library beyond what is available in the budget? Select all that apply.

- A. Grants
- B. Fundraisers
- C. Donations
- D. Other (please write in)

How much of your personal spending was reimbursed by the school in 2020-2021?

- A. None
- B. 25%
- C. 50%
- D. 75%

- E. 100%
- F. Not applicable

Do you claim a tax-deduction for out-of-pocket expenses?

- A. Yes
- B. No
- C. This is not an option where I live
- D. Prefer not to say
- E. Not applicable

What was different about your out-of-pocket expenses for the school library in 2020-2021 than other years?

If you could change one thing so that you would have less out-of-pocket expenses to support the school library, what would it be?

Do you have any advice for other school librarians who spend their own money for job-related expenses?

Please share any additional thoughts you would like related to spending personal money for the school library.

## **Section 2: School Characteristics**

Which best describes your position?

- A. School librarian
- B. School library assistant/paraprofessional
- C. Teacher
- D. Volunteer
- E. Principal
- F. Other
- G. Prefer not to say

What is your annual school library budget (USD)?

- A. \$0-\$500
- B. \$500-\$1,000
- C. \$1,000-\$5,000
- D. \$5,000-\$10,000
- D. \$10,000-\$15,000
- E. More than \$15,000
- F. Prefer not to say

At which type of school do you work?

- A. Traditional public school
- B. Charter school
- C. Private school
- D. Other (please write in)
- E. Prefer not to say

Which best describes the community in which your school is located?

- A. City
- B. Suburban
- C. Town
- D. Rural
- E. Prefer not to say

What instructional level does your library serve?

- A. Elementary (grades PreK-5 grade)
- B. Secondary (grades 6-12)
- D. Post-secondary (grades 13+)
- E. K-12 (all grades)
- F. Prefer not to say

Approximately how many K-12 students in your school were approved for free or reduced lunch?

- A. 0-24%
- B. 25-49%
- C. 50-74%
- D. 75% or more
- E. Unsure
- F. This does not apply to my school

Approximately how many students are enrolled in your school?

- A. Less than 100
- B. 100-299
- C. 300-499
- D. 500-699
- E. 700-999
- F. 1,000 or more

### Section 3: Demographics

What gender do you identify as?

- A. Man
- B. Woman
- C. Non-binary
- D. Prefer not to answer
- E. Other

What is your age?

- A. 18 - 30 years old
- B. 31 - 40 years old
- C. 41 - 50 years old
- D. 51 - 60 years old
- E. 61+ years old
- F. Prefer not to answer

Please specify your ethnicity.

- A. Caucasian
- B. Black or African-American
- C. Latino or Hispanic
- D. Asian
- E. Native American
- F. Native Hawaiian or Pacific Islander
- G. Two or More
- H. Other/Unknown
- I. Prefer not to say

Where is your school library located?

- A. North America
- B. Central America
- C. South America
- D. Europe
- E. Africa
- F. Asia
- G. Australia/New Zealand
- H. Caribbean Islands
- I. Pacific Islands
- J. Other: \_\_\_\_\_
- K. Prefer not to say

If you live in the United States, in which region do you live?

- A. I do not live in the United States
- B. Midwest - IA, IL, IN, KS, MI, MN, MO,ND, NE, OH, SD, WI
- C. Northeast - CT, DC, DE, MA, MD, ME,NH, NJ, NY, PA, RI, VT
- D. Southeast - AL, AR, FL, GA, KY, LA,MS, NC, SC, TN, VA, WV
- E. Southwest - AZ, NM, OK, TX
- F. West - AK, CA, CO, HI, ID, MT, NV, OR,UT, WA, WY

What is the highest degree or level of education you have completed?

- A. Some High School
- B. High School
- C. Bachelor's Degree
- D. Master's Degree
- E. Post-Master's degree (i.e., EdS, JD, etc.)
- F. Ph.D. or higher
- G. Trade School
- H. Prefer not to say

Are you married?

- A. Yes
- B. No
- C. Prefer not to say

What is your annual household income?

- A. Less than \$24,999
- B. \$25,000 - \$49,000
- C. \$50,000 - \$99,000
- D. \$100,000 - \$199,000
- E. More than \$200,000
- F. Prefer not to say

What is your school librarian salary?

- A. Less than \$20,000
- B. \$20,000 - \$39,999
- C. \$40,000 - \$59,999
- D. \$60,000 - \$79,999
- E. \$80,000 - \$99,000
- F. \$100,000 - \$199,000
- G. More than \$200,000
- H. Prefer not to say

What is your current employment status?

- A. Employed Full-Time
- B. Employed Part-Time
- C. Seeking opportunities
- D. Retired
- E. Prefer not to say

How many years have you served as a librarian?

- A. I am in my first year.
- B. 1-3 years
- C. 4-6 years
- D. 7-9 years
- E. 10 or more years
- E. Prefer not to say

How many dependents do you have?

- A. None
- B. 1-2
- C. 3-4
- D. 5 or more
- E. Prefer not to say

## Cite This Article

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