Budgeting : Part Two
Persuasively Presenting Your Budget
John Thompson, Director, Indianhead Federated Library System
Introduction

Today we will share tips on presenting your budget on paper and in person along with ways to advocate/showcase the library.
## Turn your Budget Numbers into a Story

### Operating Revenue

<table>
<thead>
<tr>
<th>Source</th>
<th>2015 Budget Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Municipal appropriation request</td>
<td>$59,200.00</td>
</tr>
<tr>
<td>Home County</td>
<td>$36,814.00</td>
</tr>
<tr>
<td>Other Counties</td>
<td>$956.00</td>
</tr>
<tr>
<td>Fines and Fees</td>
<td>$1,500.00</td>
</tr>
<tr>
<td><strong>Operating Revenue TOTAL</strong></td>
<td><strong>$98,470.00</strong></td>
</tr>
</tbody>
</table>

### Operating Expenditures

<table>
<thead>
<tr>
<th>Item</th>
<th>2015 Budget Request</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payroll</td>
<td>$56,370.00</td>
</tr>
<tr>
<td>Employee Benefits</td>
<td>$6,758.00</td>
</tr>
<tr>
<td>Books</td>
<td>$8,000.00</td>
</tr>
<tr>
<td>Magazines</td>
<td>$900.00</td>
</tr>
<tr>
<td>Audiovisual/E-Resources</td>
<td>$4,000.00</td>
</tr>
<tr>
<td>Telephones/Internet</td>
<td>$1,700.00</td>
</tr>
<tr>
<td>Supplies</td>
<td>$2,200.00</td>
</tr>
<tr>
<td>Technology/ILS</td>
<td>$4,400.00</td>
</tr>
<tr>
<td>Continuing Education</td>
<td>$3,000.00</td>
</tr>
<tr>
<td>Programming</td>
<td>$1,500.00</td>
</tr>
<tr>
<td>Public Relations/Advertising</td>
<td>$642.00</td>
</tr>
<tr>
<td>Copier Lease/Maint.</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>Building Utilities/Maint.</td>
<td>$8,000.00</td>
</tr>
<tr>
<td><strong>Operating Expenditures Total</strong></td>
<td><strong>$98,470.00</strong></td>
</tr>
</tbody>
</table>
Budget Development

Even in tight budget years it is important to communicate the library’s needs.
Library Jargon

• Avoid using library terms
  • Jargon
    • ILL—Interlibrary loan--Sharing of materials between libraries
    • ILS
    • The library’s circulation for 2015 was 100,000 items.
circulation

noun

plural -s

1: movement or passage in a circuit or other curving or bending course typically with return to a starting point

<circulation of air through the building>
<circulation of water in the lake>

2: the orderly movement of liquid or dissolved matter through a living body:

5 a: the average number of copies of a publication sold or less frequently distributed over a given period

<a country paper with little more than five hundred circulation — W. A. White>

b: the number of persons exposed to an advertisement or sales message by the use of a certain advertising medium; especially: potential audience with available receiving sets

<the circulation of a radio program>
<increasing TV circulation>

6 a: the elements of communication within a building (as foyers, halls, corridors, stairways, and elevators)

b: unhindered passage or motion about an area

<this arrangement of doors permits easy circulation>
<a parking garage with free circulation of cars>

8 a: the lending of books or other library materials for outside use

b: the total number of items taken by borrowers from a library

c: a single borrowing of a library book

<a strong binding good for 100 circulations>

9: free active social life with different persons or groups

<getting back into circulation after her divorce>

http://unabridged.merriam-webster.com/unabridged/circulation
Budget Presentation

Proposed 2015 Library Budget Request

Where People & Ideas Meet & Connect

Adopted by the Library Board 8/25/2014

Contents:
- Introduction: Page 1
- Library Income: Page 2
- Library Expenditures: Pages 3-5
- Budget Summary: Page 6
Budget Narrative—Tie to library plan

http://www.ci.waukesha.wi.us/c/document_library/get_file?uuid=27702cbf-0cfc-4a24-983b-b1c2642e14a3&groupId=10113
Budget Narrative--
Where we have been/Where we are going

Introduction

The Public Library provides materials, resources and services that enhance and contribute to individual knowledge, enlightenment, and enjoyment creating a vibrant center of our community.

Our mission statement is anchored by the following assumptions:

- A responsibility to offer free library service
- The Village’s commitment to a municipal library
- Cooperate efforts with other Village departments, other libraries, and other community organizations.
- Community needs drive our services
- Emphasizing and encouraging children to read.

2014 Accomplishments

- Enhanced the meeting room with a TV monitor and new seating
- Increased library awareness activities
- Started adult programming in partnerships with the Friends of the Library
- Provided outdoor seating for community and Wi-Fi access

2015 Activities

- Provide additional adult library programming
- Continue partnership with the School District

As part of our ongoing efforts to enhance the community and improve library service to the community we have developed this proposed 2015 budget to continue our investment in our community.

Thank you for your consideration of our 2015 budget request. If you have any questions or comments regarding the budget request or library service, please contact Library Board President at or Library Director at...
Budget Narrative—Peer Libraries

- Libraries in similar size communities with similar circulation
- Municipal peers
  - Does the municipality already compare itself to other communities
- Sports rivals
Budget Narrative—Use Charts

<table>
<thead>
<tr>
<th>Library</th>
<th>Municipal Population</th>
<th>Circulation</th>
<th>Staff FTE</th>
<th>2014 Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>XYZ Public Library</td>
<td>2,940</td>
<td>94,468</td>
<td>4.90</td>
<td>$ 42,000</td>
</tr>
<tr>
<td>PDQ Public Library</td>
<td>3,183</td>
<td>69,818</td>
<td>3.39</td>
<td>$ 42,864</td>
</tr>
<tr>
<td>Memorial Public Library</td>
<td>3,296</td>
<td>77,576</td>
<td>4.68</td>
<td>$ 40,000</td>
</tr>
<tr>
<td>Far Away Public Library</td>
<td>2,809</td>
<td>71,140</td>
<td>3.15</td>
<td>$ 46,467</td>
</tr>
<tr>
<td>Really Cool Public Library</td>
<td>3,234</td>
<td>69,717</td>
<td>4.07</td>
<td>$ 44,137</td>
</tr>
</tbody>
</table>
## Budget Narrative—Charts or Graphs

**Chart**

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Municipal Request</td>
<td>$71,000.00</td>
</tr>
<tr>
<td>XYZ County</td>
<td>$36,814.00</td>
</tr>
<tr>
<td>Other Counties</td>
<td>$8,642.00</td>
</tr>
<tr>
<td>Fines and Fees</td>
<td>$1,500.00</td>
</tr>
</tbody>
</table>

**Graph**

Pie chart showing library revenue breakdown:
- Municipal Request: $71,000.00
- XYZ County: $36,814.00
- Other Counties: $8,642.00
- Fines and Fees: $1,500.00
Budget Narrative—Use Pictures

Programming

Adult
Goal 1: Enhance library programming to meet the needs of the community.
   Objective 1: Increase the number and variety of educational, leisure and cultural programs for adults.

Young Adult
Goal 1: Increase young adult participation in library activities.

Youth Services
Goal 1: Encourage children and their families and/or caregivers to visit the library.
Goal 2: Provide programming/services for parents, teachers, home school educators, and students.
Goal 3: Promote early literacy.

Public Relations/Advertising
As part of our long range plan the library is seeking to increase outreach efforts to community residents and the growing minority population in the community.
Goal 1: The library will utilize a variety of channels to promote its services and increase its visibility in the community.

Copier Lease/Maintenance
Advocate for the Budget

• Know your Municipal Board Members/Community
  • Start soon
    • Candidate Forums
    • Post-election meetings to share information about the library
  • Invite them to the library events
  • Have a presence at community events
  • Informally network
    • Coffee shop
    • Conversations at the corner
Advocate for the Budget

- Know your Municipal Board Members
  - Attend meetings
    - Not just at budget time
    - Attend all meetings where the library budget may be discussed
    - Bring Friends
    - See the interaction of board members/how they vote
  - Read the minutes
    - Learn what is going on in the community
    - Learn how members vote
Advocate for the Budget

- Use little or no library jargon
- Provide charts and other comparison information
- Use format required by municipality
- Present budget to appropriate committees and boards
- Thank the committee and boards for their consideration of the library budget
Advocate for the Budget

- Match the message with the audience
  - Some want numbers
  - Others want big picture
  - Know and respect time limits
  - Possible solutions for community concerns
  - Don’t over promise
Advocate for the Budget
Match Community Needs with Library Services

• Don’t assume they know about library services
  • Job Searching/Resume writing—Unemployment/Business Closings
  • Teen Programs/Services—Lack of activities for teens/concerns of business owners
  • Lack of family activities—Movie Night; Family Storytime
  • Genealogy/Historical Society—Ancestry Library Edition and HeritageQuest Online
  • Migrant workers—Literacy services
  • Computers/Internet Access
Advocate for the Budget

Don’t assume they know how libraries are funded
Advocate for the Budget
Share Stories

- Share stories from patrons
- Have patrons speak at budget hearing
- Impacts on people’s lives
Advocate for the Budget
Sharing Resources

• Libraries are cost-efficient operations
  • Share materials
  • Access to electronic materials
  • Online databases
  • Share cost of programs
  • Exchange ideas
Resources—Sample Budgets

Contact Information

• John Thompson, Director, Indianhead Federated Library System
  • thompson@ifls.lib.wi.us
  • 715-839-5082 ext 116