

## Drafting and Justifying a Budget Request

### 1. Always be sure that your library’s long range plan and your programs and services are in alignment with your community’s needs and goals.

- Study the town’s comprehensive plan, if available, or other planning documents.
- Always have a library presence at select board or town council meetings just to note what is being talked about.
- Pay attention to the town bulletin board if there is one.
- Offer to speak at local service group meetings and then stay to hear what they talk about.

Ask yourself:

- How do my library’s services and programs align with community needs?
  - For example, if you hear that economic development is a major priority is the library offering job preparation classes such as resume writing? Are you publicizing that community members can access, for free through MARVEL!, Learning Express Library which has job search and job skills courses?
  - If early literacy and school readiness are concerns, are you emphasizing to parents that your pre-school story time is designed to teach basic literacy skills to both the children and the parents?

(<http://www.maine.gov/msl/libs/services/childliteracy.htm> )

- What services or programs should the library be concentrating on to demonstrate community impact? What can we stop doing so that we have time and resources to devote to different programs and services?
- Can I use Project Outcome ( <https://www.projectoutcome.org/> ) surveys to gather impact data for some of my programs?
- Can we think more intentionally about what the services and programs we offer to make sure that we are aligned with our community?

### 2. Look at the public library annual report statistics.

A. Open the report at:

<http://www.countingopinions.com/pireports/report.php?d825d61baaddc0645085d7d612fd1324>

Click on the Excel icon to download the spreadsheet to your computer.

**Data for Budget Justification**

Collection: Maine Public Library Statistics, Maine Census Data    Period: 2016,

Location (262)	1.8 Population of the Legal Service Area	3.3 Local Government Revenue	4.1 Children's Programs	4.3 Young Adult Programs	4.5 Adult Programs	4.21 Library Visits	4.22 Library Tr...
ABBOTT MEMORIAL LIBRARY	8,764	\$59,841	12	0	36	9,015	
ABEL J. MORNEAULT MEMORIAL LIBRARY	2,387	\$50,363	12	2	22	6,950	
ACTION PUBLIC LIBRARY	2,575	\$18,840	15	8	10	2,266	
ALBERT CHURCH BROWN MEMORIAL LIBRARY	4,243	\$4,500	12	0	5	1,474	
ALBERT F. TOTMAN LIBRARY	2,241	\$32,000	26	5	49	10,562	
ALBION PUBLIC LIBRARY	2,048	\$6,500	32	0	5	1,304	
ALICE L. PENDLETON LIBRARY	565	\$72,742	20	0	22	9,360	
ANDOVER PUBLIC LIBRARY	811	\$28,000	1	0	1	2,998	
ANNA FIELD FERNALD LIBRARY	830	\$1,800	0	0	26	52	
ASHLAND COMMUNITY LIBRARY	2,021	\$44,623	0	0	0	6,542	

1/27    Sort multiple columns by holding down the shift key and clicking another

# Data in Action Series



Click on Enable Editing.

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

Location	1.8 Populati	3.3 Local Gd	4.1 Children	4.3 Young A	4.5 Adult Pr	4.21 Library	4.22 Referer	ILL Receive
ABBOTT MEMORIAL LIBRARY	8,764	\$99,841	12	0	36	9,015	0	387
ABEL J. MORNEAULT MEMORIAL LIBRARY	2,387	\$50,363	12	2	22	6,950	870	6
ACTON PUBLIC LIBRARY	2,575	\$18,840	15	8	10	2,266	372	51
ALBERT CHURCH BROWN MEMORIAL LIB	4,243	\$4,500	12	0	5	1,474	66	51
ALBERT F. TOTMAN LIBRARY	2,241	\$32,000	26	5	49	10,562	412	227
ALBION PUBLIC LIBRARY	2,048	\$6,500	32	0	5	1,304	46	42
ALICE L. PENDLETON LIBRARY	565	\$72,742	20	0	22	9,360	148	15
ANDOVER PUBLIC LIBRARY	811	\$28,000	1	0	1	2,998	-1	22
ANNA FIELD FERNALD LIBRARY	830	\$1,800	0	0	26	52	0	0
ASHLAND COMMUNITY LIBRARY	2,021	\$44,623	0	0	0	6,542	241	0

B. Follow these steps to set up a peer comparison group by sorting the data by population.

Click on the Data tab

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Cut Copy Paste Format Painter

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Clipboard Font Alignment

Location	1.8 Populati	3.3 Local Gd	4.1 Children	4.3 Young A	4.5 Adult Pr
ABBOTT MEMORIAL LIBRARY	8,764	\$99,841	12	0	36
ABEL J. MORNEAULT MEMORIAL LIBRARY	2,387	\$50,363	12	2	22
ACTON PUBLIC LIBRARY	2,575	\$18,840	15	8	10
ALBERT CHURCH BROWN MEMORIAL LIB	4,243	\$4,500	12	0	5
ALBERT F. TOTMAN LIBRARY	2,241	\$32,000	26	5	49
ALBION PUBLIC LIBRARY	2,048	\$6,500	32	0	5

Choose Sort

File Home Insert Page Layout Formulas Data Review View Add-ins Acrobat

From Access From Web From Text

From Other Sources Existing Connections New Query Recent Sources

Get External Data Get & Transform

Show Queries From Table Recent Sources Refresh All

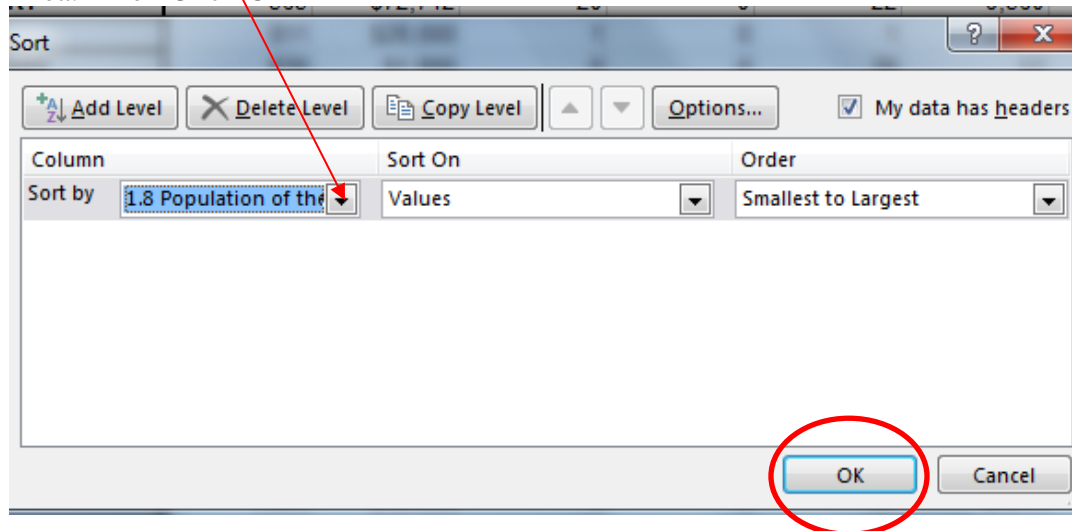
Connections Properties Edit Links

Sort Filter

Location	1.8 Populati	3.3 Local Gd	4.1 Children	4.3 Young A	4.5 Adult Pr
ABBOTT MEMORIAL LIBRARY	8,764	\$99,841	12	0	36
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ACTON PUBLIC LIBRARY	2,575	\$18,840	15	8	10
ALBERT CHURCH BROWN MEMORIAL LIB	4,243	\$4,500	12	0	5
ALBERT F. TOTMAN LIBRARY	2,241	\$32,000	26	5	49
ALBION PUBLIC LIBRARY	2,048	\$6,500	32	0	5

## Data in Action Series

Click on the Arrow on the right side of the Sort By box and choose 1.8 Population of the Service Area. Then Click OK



Locate your library in the sorted data and choose peers within 1,000-4,000 of your population. If that group is too large, narrow the population. Be aware that population may not be the only factor to consider for your peer group. Take into account the entire context for the peer libraries such as where they are located in relation to other libraries or what tools they might have that you don't.

Analyze the data for that group to see where your library fits. (Note: Anywhere in the spreadsheet that you see “-1” means that the library did not report any data.)

Ask yourself:

- How does the allocation from my town compare to other libraries serving a similar population?
- Is my staffing level in line with other libraries with similar allocations?
- Is my library offering a similar number of programs?
- How do my library visits, reference transactions, ILL Received and ILL Provided compare to the peer group?
- Does my library have enough computers?
- Are the computers and /or WiFi being used to a similar degree as my peers?
- Are any of these areas way out of alignment with my peer group? Should I build a case for a bigger budget allocation for any of these areas?

### 3. Look at community demographics to highlight where the library's programs have impact.

Use the American Community Survey ( <https://www.census.gov/acs/www/data/data-tables-and-tools/data-profiles/2015/> ). Be sure to cite your sources.

Ask yourself:

## Data in Action Series



- What do my community's age groups, poverty levels, educational attainment or jobless rates tell me about the services and programs the library should be offering?
- Are there age or immigrant groups that the library isn't currently serving?
- What is the community saying at town meetings, select board meetings or on community bulletin boards? How can the library use this information to align services and programs to the needs and demonstrate community impact?

### 4. Use other local data

Ask yourself:

- What percentage of the total town budget is the library's allocation?
- How does that translate into an actual dollar amount per citizen?
- Have I used my annual report statistics with the Public Library Use Value Calculator (<http://www.maine.gov/msl/services/calculator.htm>) to demonstrate the Return on Investment (ROI) (<http://www.maine.gov/msl/libs/statistics/roi.htm>) to my community?

Armed with the information you've gathered from all of these sources, work with your staff and your board to draft a budget that will allow the library to continue making an impact in your community.

For tips in presenting this information to your stakeholders, watch the webinar 'Data Visualization for the Rest of Us: A Beginner's Guide' at <https://my.nicheacademy.com/mslstaff/course/5470>