Preparing for a Budget Presentation: A Checklist

1. Do Your Homework

✓ Can you explain why the library needs the funding being requested?
✓ How will the funding affect your community? The lives of those community residents?
✓ How will service improve overall?
✓ What statistics will you use? What stories will you use? Do they support your position clearly?
✓ Identify those in your community who regularly are successful in their budget requests. Have you asked them for input?
✓ Are you working with your budget director?
✓ Have you made your Trustees and influential allies aware of your request? Will they be able to answer questions if asked?

2. Writing the Budget Proposal

✓ Can you explain how the current budget was spent?
✓ Is the budget clearly written and easy to understand?
✓ Is it accurate?
✓ Do the charts and graphs support your argument?
✓ Can you present stories that attest to the impact of library services on people in your community?
✓ Have you made any of the decision-makers in your community aware of your request?

3. Following Up

✓ No matter what happens, remember to thank everyone who helped – and even those who didn’t.
✓ Remember to provide periodic updates on how the funding is helping the library better serve the community.
✓ Whether your request was declined or fulfilled, remember there’s always more work to do!
  o Keep building those relationships with influentials.
  o Build your coalition of library supporters.
  o Keep in touch with the needs and priorities of your communities.
  o Advocacy needs to happen every day!