



Trustee Update

Library News You Can Use

Now it begins—2009 budget request

If you haven't already, it is time to begin working on your library's 2009 budget request. This article will highlight some important things about the process.

Estimating your expenses

To begin, it is important to review your strategic plan and goals for the coming year. You will need to estimate the funding required to do the things you plan to do.

At its simplest level, this is a matter of estimating your expenditures for the coming year, estimating revenues you will receive from other sources, and subtracting those revenues from the estimated expenditures to result in the municipal budget request. However, this is an oversimplification. If you don't get all that you estimate from other sources, you will still need enough to operate. Providing this "cushion" is the responsibility of the municipality that established the library. Similarly, if you get more than expected from another source (for example, your county), that doesn't relieve the municipality of its responsibility—rather, it should be an opportunity for the library to pursue new initiatives, or make up for past shortfalls.

State Statutes

As part of the budget process, you should review these statutes relating to library budgets.

- ✓ "Maintenance of Effort"—Your municipality must appropriate a library operating budget of at least the average of the previous 3 years. Wis. Stat. 43.15(4)(c)(5)
- ✓ County payments—Counties (that don't maintain a consolidated county library) are required to reimburse libraries in the

county, and adjacent counties, for serving residents that aren't residents of a municipality that maintains a public library. Wis. Stat. 43.12

- ✓ Exemption from county tax—The municipality must appropriate at least enough to exempt from the library portion of the county tax, or its residents will be "double taxed" (by both the municipality and the county) for library services. Wis. Stat. 43.64



- ✓ Board's exclusive control—The library board, not the municipality, has exclusive control of the money appropriated for the library fund. Wis. Stat. 43.58(1). It is DLTCL's opinion that this includes the authority to carry forward unexpended funds from one year to the next.

Levy Limits

For 2009 budgets, municipalities are under a tax levy limit of 2%, or the percentage of net new construction, whichever is greater, or they may exceed these limits if approved by referendum. Net New Construction figures for 2008 are available at www.revenue.wi.gov/equ/nnc.pdf; 2009 figures will become available in August. It is important to remember that an increase of more than 2% in the library's budget doesn't mean that another department, with a much larger budget, will get no increase.

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Tips for getting the budget you request

- Back-up your budget request with statistics and anecdotes.
- ✓ Statistics—Numbers illustrate library usage, and can highlight funding inequities. Your state annual report is a good source for statistics. Choose statistics that illustrate the need you describe.
- ✓ "Break it Down"—It can be hard to grasp what is meant by huge dollar amounts. A \$20,000 increase in your municipal appropriation may sound like a lot, but by dividing the increase by the municipal population you can say something like, "The increase translates to less than \$14 per capita, or less than 3¢ per day. Isn't that a small price to invest in the future for our children?"
- ✓ Testimonials/Anecdotes—While numbers and statistics are impressive, it may be easier for your audience to relate to real life stories from customers. ❖

Resources to help with your budget

- 💰 "Developing the Library Budget" (Administrative Essential #13)—<http://dpi.wi.gov/pld/ae13.html>
- 💰 "Developing the Library Budget" (Trustee Essential #8)—<http://dpi.wi.gov/pld/te8.html>
- 💰 "Money Matters!" (SCLS workshop)—<http://www.scls.info/ce/program/#MoneyMatters>

New resource helps students of all ages!

Earlier this year SCLS member libraries began offering a new online resource called LearningExpress Library, a comprehensive, interactive online learning platform of practice tests and tutorial course series designed to help library users (both students and adult learners) succeed on academic or licensing tests.

Whether library users are students interested in skills improvement, high school students preparing for the ACT or SAT, or an adult preparing to take a cosmetology exam, LearningExpress Li-



brary can help! There are more than 300 practice exams that will help your library users achieve their academic and career goals. They can take a practice test and get immediate scoring, com-

plete answer explanations, and an individualized analysis of results.

LearningExpress Library (www.scls.info/testprep/) is paid for jointly by SCLS and member public libraries. It is another example of how system membership allows libraries to provide resources they couldn't afford to purchase on their own. ❖

SCLS staff contacts:

Questions about preparing library budget requests, the annual report, Wisconsin library law, or library trustee powers and responsibilities? Contact Cheryl Becker at (608) 246-7973 or cbecker@scls.lib.wi.us.

Questions about marketing, advocacy and funding? Contact Mark Ibach at (608) 246-5612 or mibach@scls.lib.wi.us. ❖

Did you know...

...that libraries are among the most effective of all public services, serving more than 97 percent of the public with less than .00006 percent of all federal tax dollars (six one-hundred-thousandths of every federal tax dollar)?

--American Library Association

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