

Selling your Public Works Budget to Your Board and the Public

In these difficult economic times, it is even more critical that you can successfully sell your public works budget to the elected officials of your local agency and to the public.

Here are a few tips from Hank Lambert, former Director of the Vermont Local Roads Program, who developed a training program on Budgeting for Public Works Professionals.

DEVELOP A CONCISE SUMMARY OF THE BUDGET

A concise summary and guide for informing the Board and involving the public is valuable. There is no set format. It may include a transmittal letter, a budget message, an executive summary, a budget-in-brief. At a minimum, a summary should do the following:

- 1. Summarize the major changes in priorities or service levels from the current year and the factors leading to those changes.**
- 2. Articulate the priorities and key issues for the new budget period.**
- 3. Identify and summarize major financial factors and trends affecting the budget, such as economic factors; long-range outlook; significant changes in revenue collections, tax rates, or other changes; current and future debt obligations; and significant use of or increase in fund balance or retained earnings.**
- 4. Provide financial summary data on revenues, other resources, and expenditures for a least a three-year period, including prior year actual, current year budget and/or estimated current year actual and proposed budget.**

TIPS FOR PRESENTING THE BUDGET TO YOUR BOARD AND TO THE PUBLIC

Ask first: “Have I fully involved my staff in developing the department’s budget?”

- 1. Tailor your presentation to the situation, and what you want the Board (and the public) to decide. Begin with an overview of the presentation.**
- 2. Revenue section**
 - a. Explain key assumptions in developing revenue projections**
 - b. Show anticipated revenues by source**
- 3. Expenditure section**
 - a. Explain key assumptions: inflation rates, staff turnover, anticipated increases**
 - b. Show expenditures by program**
 - c. Project changes in salaries and fringe benefits**
- 4. Program Section**
 - a. Briefly explain new requirements**
 - b. Give status reports on programs and success of new initiatives**
 - c. Explain proposed new program initiatives and justification: pay for itself, will improve efficiency; will improve performance/safety/liability. Stress benefits to be achieved.**
- 5. Focus on what interests members of the audience (support existing programs, new programs, effect on property taxes, and staffing)**
- 6. Discuss implications of the budget (facilities, taxes, debt); show benefits if passed; explain the consequences if the budget is cut.**

The Technology Transfer Center looks forward to bringing this valuable training to Connecticut in the future as a part of our Road Scholar program or our new Transportation Leadership Academy.