



Section/Roundtable Budget Worksheet Fiscal Year 2024-2025

Please carefully review all directions before filling out and submitting the Budget Worksheet. All Sections/Roundtables (hereinafter referred to as Units) will be required to submit a Budget Worksheet annually outlining all anticipated expenses to be included in the upcoming year's budget. **This worksheet will be due by February 1st of each year.**

When completing this worksheet please review any past year budgeting, expense records, etc. to assist in determining what amount your Unit anticipates spending in the next fiscal year. Think about new activities, programming, and continuing education your unit plans to offer. Do **not** include anticipated income/revenue from registration, sponsorship, etc.

You may also want to review this year's treasurer meeting video if you were unable to attend as it may provide further clarification as to what should be included in your form. [Click here to review this video.](#) Following your submission, the NYLA office and the Budget and Finance Committee will work together to draft NYLA 's annual budget for review, discussion, and approval via a vote by the NYLA Council.

Here are some of the items to consider when outlining your Unit's budgetary needs:

- **Unit Events and Programs – conference speaker fees, webinars, etc.**
- **Printing and mailing costs.**
- **Digital promotion, ads or banners**
- **Fees for platforms or other accounts**
- **Stipends for contracted work, executive board, etc.**
- **Miscellaneous expenses (raffle tickets, candy for event tables, giveaways, etc.)**

This worksheet is intended to help Units consider all their financial needs throughout the year. Should unanticipated expenses or the ability to offer opportunities of value to membership arise after the budgeting process is complete, Units will have the opportunity to request additional funding from NYLA Council. ***Please note: Units may be asked for additional information during the budgeting process. Budget Worksheets will be presented to, discussed, and approved by Council annually at the May Council meeting. This worksheet does not guarantee approval of all items outlined by Units on the submitted worksheet however, good faith efforts will be made to ensure all units are funded as requested. Failure to complete a budget worksheet will result in a standard minimum amount in the Unit's budget line. This amount will be set by Council. Units which over/underspend their annual budget will be asked to reevaluate their request in future years.***

Thank you for your time and efforts to make our Statewide organization a valuable resource to New York's Library Community.

Warmly,
NYLA Treasurer



Section/Roundtable Budget Worksheet

Fiscal Year 2024-2025

Section/Roundtable: _____

Use the following spreadsheet to help you itemize expected expenditures. Please note items/programs can be grouped into one lump expense. For example, all unit conference fees (venue costs, speaker fees, food and beverage, tradeshow fees, etc.) can be listed as conference expenses. Multiple sheets can be combined if required.

Item/Program Name	Justification	Amount
Total Amount Requested		

*President and Treasurer signatures are required. Forms submitted without both signatures will be returned with the request for the missing signature be provided.
Please note by typing your name below, you acknowledge all information provided in this form is accurate.*

Unit President Signature: _____ **Date:** _____

Unit Treasurer Signature: _____ **Date:** _____