How Libraries Actually Get Funded: Understanding Tax Policy, Budget Practices, and Your Fiscal Partnerships

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EveryLibrary | Pro Bono 501(c)4 Political Action Committee

- Election Days and Negotiations
- Support for Legislative Agendas
- Outreach and Activism to the Public

EveryLibrary Institute - 501(c)3 Research and Policy Think Tank

- Research Agenda
- Training Programs
- Programmatic Partnerships and Coalitions

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Theory of Advocacy; Theory of Activism

Advocacy is….

A process that creates partnerships and coalitions around a common cause or concern.

Advocacy is a long-game.

It is focused on building relationships through an understanding a shared-values framework, purposefully aligning missions, and finding ways to realize a common vision for either people or a place.

Theory of Advocacy

If your advocacy framework assumes an adversarial situation then you have a real problem.

- Education
  - What are libraries capable of today?
- Orientation
  - Who are librarians and library workers today?
- Ideation
  - What could a shared solution look like?
- Identification
  - What resources do we need in place to authentically collaborate?
- Activation
  - When will be we both commit to a collaboration?

Activism is….

Strident actions that ask for - and expect - a change.

Activism is short but frequent values-system-focused and identity-focused messages that are intended to move people who are otherwise unaware or inactive about an issue or idea into a close personal alignment and identification with an an ideal.

Theory of Activism

If you are not willing to be focused on your own self interest and use an active voice, all you are is hopeful.

- Based in Shared Values
  - It affirms or offends a belief
- Focused on Shared Identity
  - It builds community
- Has Integrity
  - It is honest in its motivation and authentic in its goals
- Directs Activity
  - It uses verbs and speaks in the first person
- Organizes Supporters
  - It identifies, cultivates, and empowers

Common Characteristics

Successful Advocacy and Activism are centered around a shared values system and a shared identity:

- Are your values affirmed or offended?
- Is your identity supported or threatened?

Articulating your underlying values and demonstrating your identity is essential to every campaign.

Who's Agenda

Values and Mission

Two Questions that Need to Be Asked by Library Leaders:

Are our values reflected in the law and budget?

Are we empowered or disenfranchised by laws and budgets?

Understanding Your Position in Town

Q: Is the library a '**core**' part of community life or is it a '**complement**' to parts of community life and community success?

Types of Decision Making

Start your advocacy **prior to** a time when decisions are ‘forced’.

- Head - Representative Heuristics
- Heart - Availability Heuristics
- Gut - Anchoring Heuristics

Our Thesis about Talking to People in Power

Why do elected officials agree to help solve your problems?

It isn't because you told them a good story.

It is because you have successfully mapped your agenda to their concerns and begun to co-create a solution together.

What Focuses the Attention of an Elected Official?

An elected official is responsible to one of three things:

People

Place

Platform

Why Give the Library Money?

There are only two reasons to ask for new funding for your library:

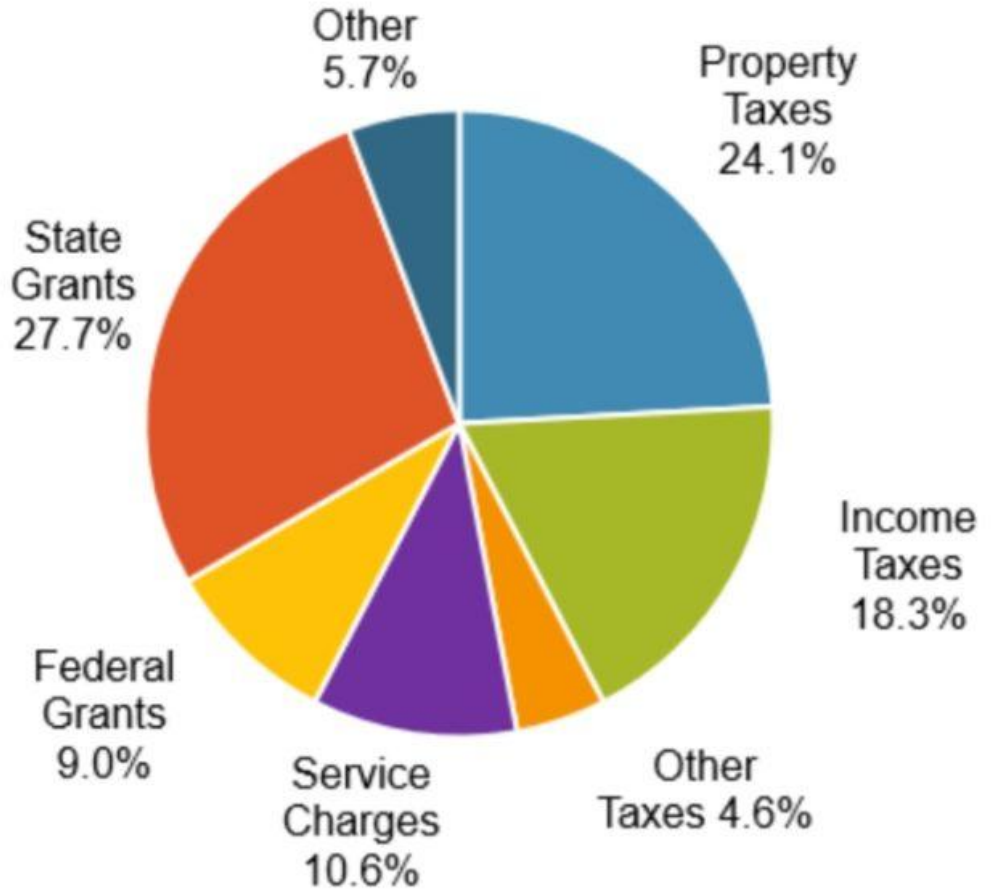
You are either trying to **scale up or replicate a prior success** or you are trying to **mitigate or fix a failure**.

Responsibilities of Governemt

Maryland Counties Responsibilities

Community Colleges - This includes support of the county or regional board of trustees of a community college that operates under state law.
Debt Service - Debt service is the annual principal and interest payments on debt issued for the development of public capital facilities, including roads, schools, libraries, parks, etc.
General Government - This grouping includes executive and legislative control, judicial support, election supervision, financial administration (budgeting and accounting), legal (counsel and prosecution*), personnel administration, planning and zoning, general services, and alcoholic beverage control..
Health - This grouping includes support of the state-required and state-regulated county health department.
K - 12th Grade Education - This includes support of the state-required county board of education
Land Planning and Development - This grouping includes such things as urban and rural development and redevelopment, housing, economic development, and economic opportunity programs.
Libraries - This includes support of the county board of library trustees that operate under state law.
Public Safety - This includes law enforcement, fire, corrections, building inspection, animal control, and traffic
Public Works - This includes road construction and maintenance, sewer, water, storm drains, and solid waste
Recreation and Parks - This includes recreational activities and facilities, and park and open space

Sources of Revenue
Counties and Baltimore City
FY 2024



Source: Local Government Finances in Maryland

Maryland County Tax Types

Types of Taxing Authority Available to MD Counties

Property
Income
Recordation
Transfer
Hotel Rental
Admissions/Amusement
Other Local Taxes

Maryland Finances

State aid is the largest revenue source for many county governments in Maryland, accounting for 27.7% of total revenues in Fiscal 2024.

State aid includes direct assistance to county governments, local school systems, libraries, community colleges, and local health departments. In fiscal 2024, local school systems receivaed approximately 84% of total State aid. County and municipal governments received 9%, with a majority of the funds targeted for transportation and public safety initiatives. Community colleges, libraries, and local health departments accounted for the remaining 7%.

Delaware Counties Responsibilities

Executive Power: Counties have the direction, management, and control of the business and finances of their jurisdictions.

Ability to Form Partnerships: Counties have the authority to make appropriations to public and private corporations and may enter into contracts with insurance companies to insure county employees and appointed officers.

Special Districts: All counties may create a park district when initiated by a petition and approved by voters. The state also empowers each county with different special district creation authority. For example, each county may create a sewage district, but only Kent and New Castle County may establish a development district.

Cemeteries: The government of each county may establish regulations regarding the maintenance of for-profit cemeteries, including maintaining the lawn, roads, and crypts.

Pandemic & Fire: All counties participate in operating and funding the statewide paramedic services program or operate their own service. New Castle may contract with any fire company authorized by the state. Sussex and Kent appropriate money to each fire company in their county.

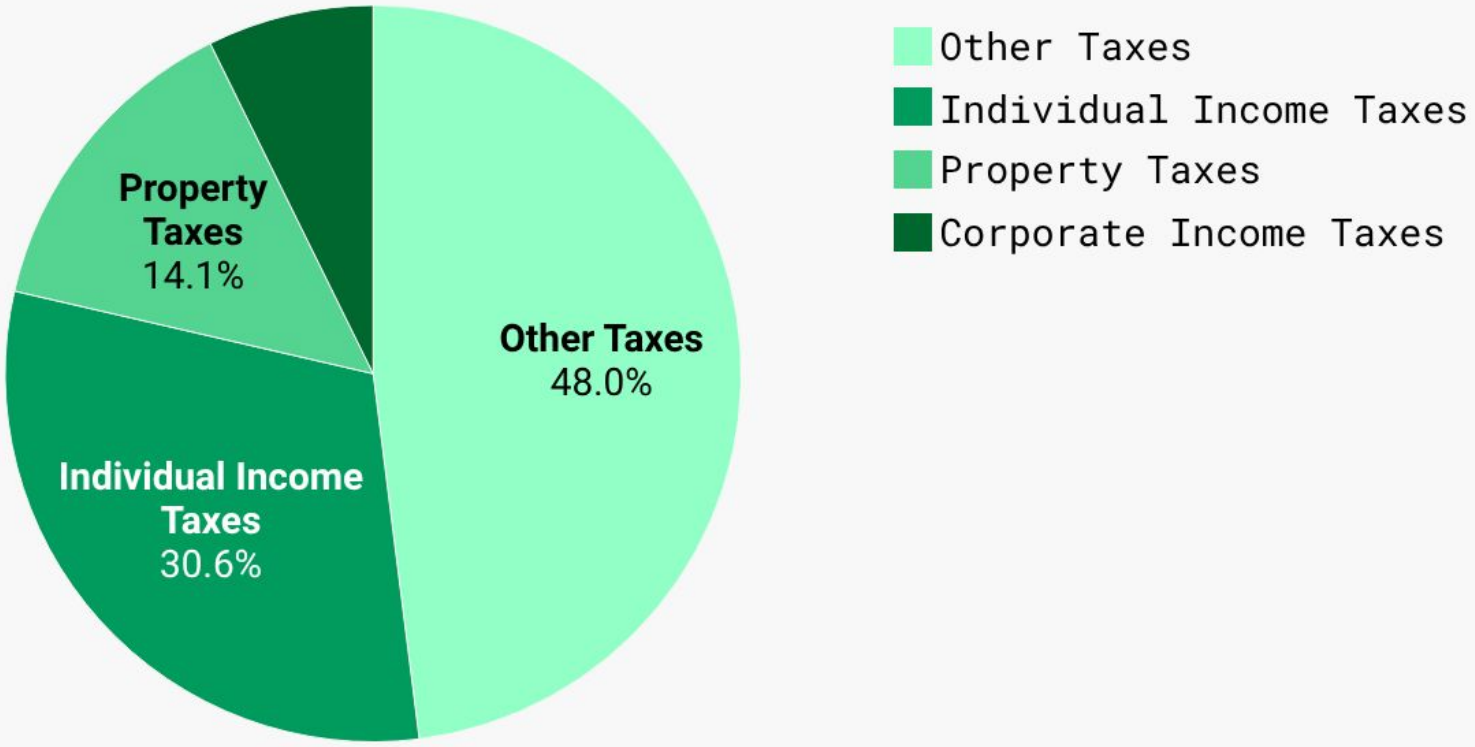
Parks: Counties can establish a county parks and recreation commission and issue bonds to finance the capital costs of parks and recreation projects.

Libraries: All counties must create a library agency as a part of the executive branch of county government.

DECEMBER 7, 1787

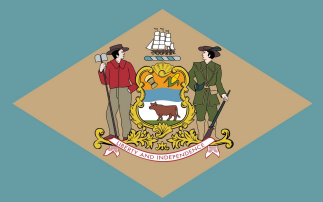
How Does Delaware Raise Tax Revenue?

Sources of State & Local Tax Collections, Percentage of Total from Each Source, Fiscal Year 2023



"Other Taxes" include excise taxes (such as those on alcohol, tobacco, motor vehicles, utilities, and licenses), severance taxes, stock transfer taxes, estate and gift taxes, and other miscellaneous taxes.
Source: US Census Bureau, "Annual Survey of State and Local Government Finances"; Tax Foundation calculations.

TAX FOUNDATION



Delaware Expenditures

Delaware's combined state and local direct general expenditures were $12.7 billion in FY 2021 (the most recent year census data were available), or $12,637 per capita. Delaware's largest spending areas per capita were public welfare ($3,135) and elementary and secondary education ($2,300).

National per capita direct general expenditures were $11,087.

How is it Going?

How Elected Officials are Wired

What is Their Agenda?

What are the agendas of your elected officials?

- Taking Care of Their People
- Making Interesting, Thriving, and Prosperous Places
- Moving a Big Idea Forward
- Avoiding Duplicative Services
- Delivering Efficient and Effective Service

How Electeds Listen

- Compassionately Engaged
  - Populations and people
- Pride of Place
  - Interesting, thriving, and prosperous
- The Data Shows It
  - Data about outcomes as lens
- Concerned or Fearful
  - Focused on filling gaps

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Committees, Councils, and Legislatures Behave Very Differently

Boards, councils and committees behave very differently than individual elected officials or appointed officials when they are doing the people's work.

Legislative Bodies are Different than the Sum of Their Parts

Councils, Boards, and Committees behave differently than *individual* elected officials when they are doing the people's work. They are driven by:

Authorizations

Appropriations

Plans

Reviews.

What Happens to (our) People?

There are two key people-focused questions for every elected official:

1. These are "What happens to people or the community if the library *gets new funding*?"

2. "What happens to people or the community if the library *does not receive* the new funding?"

What Happens to (our) Place?

What place-making systems will be added to the library with new funding? (These ‘features’ could be collections, services, staffing, programs, or facilities.)

What are the expected and hoped-for outcomes for our place if new feature is acquired and deployed?

What problems will persist in our place if the library is unable to acquire and deploy this new feature.

Understanding Your Own Agenda

1. What is the problem you are trying to solve for the people you serve or the place you call home?
2. What population or part of the community are affected by this problem?
3. How will those people or this place be impacted by a positive change?
4. What is your “ask” that will solve the problem?

What Is On Your Agenda?

A. Who do you need to ask?
B. Do they (the politician) already identify your problem as a real problem?
C. Why would they want to see your problem solved?
D. What are you asking them to do?
E. How will they do that?
F. When are they able to do that?

Why Should an Elected Official Act?

Plan A: We are asking for this new funding/authority “so that we can” properly address a problem for an impacted population or community.

Plan B: If we do not receive new funding or authority “it means we won’t or can’t” address a problem so the problem will persist for an affected population or community. We will continue to do our best, but that is inadequate to the task.

Plan A or Plan B Decision for Electeds

What are “features” you need to fulfill your mission, realize your vision, or operationalize your values?

- People
- Funding
- Buildings
- Collections

Alignments

Where is the money going to go?

Features v. Impacts

Who is going to spend the money?

Staff v. Enactors

Two Questions from Every Funder

Feature: _____

Impacted Population or Community: _____

So that we can: _____

It means we won't: _____

Features into Benefits and Define the Negative

Message Development

Collection or Feature: _____

Impacted Population or Community: _____

Organizational Partner Audience: _____

So that we can:	It means we won't:
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Framework for the Pitch

Is your library's budget in line with your own values?

Is your library's work core or complimentary?

Are your funding partner's strategic priorities embedded in your plans?

Are your goals congruent with your partner's' goals?

Is your library's plan of service and strategic plan authentic?

Plans and Budgets

What are you seeing?

Creating the Dossier

A Dossier about an Elected Official

Elected officials at all levels of government have a public profile that provides tremendous insight into their positions. In order to understand how your fundable agenda intersects with their issues, it is helpful to create a dossier on them.

Governor Meyer's Agenda

Priorities are set by "People, Place, and Platform"

https://mattmeyer.org/vision-of-delaware/

- Education
- Effective Government
- Health & Wellbeing
- Counties

What do libraries do that intersects with this agenda?

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Governor Moore's Agenda

https://priorities.maryland.gov/

1. Ending Child Poverty in the State of Maryland
2. Setting Maryland's Students Up for Success
3. Creating an Equitable, Robust, and Competitive Economy
4. Connecting Marylanders to Jobs
5. Creating Safer Communities
6. Making the State of Maryland a Desirable and Affordable Home for All Residents
7. Advancing Infrastructure to Better Connect All Marylanders to Opportunities and Each Other
8. Ensuring World-Class Health Systems for All Marylanders
9. Making Maryland a Leader in Clean Energy and the Greenest State in the Country
10. Making Maryland a State of Service
11. Government Modernization Initiative

Rewrite the Budget

"New" Money only comes from four places:

- Cuts from another department
- Reallocations within an existing tax framework.
- Outside aid or grants.
- Additional taxes.

Rewire the Discussion

How do you see libraries fitting into this project / budget / legislation / plan of service?

How do you see librarians putting this agenda item to work in the community?

Making a New Ask

- Where does this revenue come from?
- What are the priorities of my elected officials?
- What is “regular order” for the lawmaking or rulemaking body?
- How can I make this easy for them?

Making it Easy

We have developed “model language” that would address an issue we are concerned about….

We have re-written the budget so we are included in the plan of service….

What are your concerns?

Take the Meeting

The conventional wisdom in library advocacy is broken because it has never been properly connected to human behavior.

This list of advocacy maxims is mildly to wildly incorrect:

- People respond to stories
- Focus on your patrons / student stories
- Avoid being “data heavy”
- Get them into your library and you’ll win.

This is Incorrect

In the meeting you will hear:

1. Bright Spots
2. *Hot* Spots
3. What Ifs
4. Follow-Ups
5. Commitments

Five Things to Listen For

Ask to take a photo

Ask for permission to share it on social media and the library / school newsletter.

Get social media accounts for tagging.

Post it on social media.

Send the photo back to the elected with names and a caption.

General Meeting Advice

~~A. People respond to stories~~

People respond to “resonant-values”.

~~B. Focus on your patrons / customers~~

Use 1st person pronouns. “Library” is not a pronoun.

~~C. Avoid being “data heavy”~~

Engage “the numbers tell the story” people.

~~D. Get them in and you win~~

User status doesn’t matter.

Correcting the Conventional Wisdom

Back to How Humans Make Decisions

Start your advocacy **prior to** a time when decisions are ‘forced’.

- **Representative Shortcuts**
  - Making judgements based on similarities and differences to existing frameworks.
- **Availability Shortcuts**
  - Judging likelihood of an outcome based on the most recent similar story or data point.
- **Anchoring Shortcuts**
  - Basing a decision on the probability it will look like the previous decision and adjusting accordingly.

User Status Does Not Matter

A crucial and somewhat unexpected finding from the segmentation analysis was that demographics and lifestage were not important constructs in the library supporter segmentation. In fact, demographics are irrelevant to library funding support. **The factors that determine residents' willingness to increase their taxes to support their local library are their perceptions and attitudes about the library and the librarian,** not their age, gender, education level or household income. Library funding support is an attitude, not a demographic.

- OCLC "From Awareness to Funding" 2008 - p. 7-3

Haycock Rules

"The rules of advocacy include recognizing that the target warrants respect, that the target makes decisions for his or her own reasons, not ours, and that the most effective advocacy is about connecting agendas. Your agenda will be advanced by supporting our request. Advocacy is like banking—you can't make withdrawals if you have never made any deposits."

- Ken Haycock

Who or What Do The Electeds Love?

Another Haycock Rule:

"People pay attention to the things that they love and value."

Every time we prepare a communication without regard to its audience and their interests, we are essentially asking Elected Officials to pay attention to the things *that we love and value* in order for them to support us.

But We Also Love the Same Folks and Places

Another Haycock Rule:

"To build influence, use evidence and connect agendas."

Telling people what we do is ineffective. Aligning our message with impacts or cautions about the People, Place, or Platform issues of the Elected Official(s) is more likely to result in libraries getting what they want.

Extending Influence is Activating External Validations

Final Haycock Rule:

"An advocate says to decision-makers, potential partners, funders, or stakeholders, 'Your agenda will be greatly assisted by what we have to offer.'"

Coalitions allow you to advance your agenda by making it part of someone else's agenda.

What are You Thinking About?

Theory of Coalitions

Coalitions are about organizations, agencies, and stakeholder groups, not individual actor, advocates, or activists.

Coalitions are formal alliances between different groups or institutions that come together for a shared objective. They typically don't concern themselves with day-to-day operations or services, such as interlibrary loan practices or reading programs. Instead, their goals often surround securing funding or effecting policy changes that benefit the libraries and communities they serve.

Coalitions are Focused on Funding or Policy Not Programming or Services

Coalitions are focused on funding or policy, not programs and services. Co-creation is true ownership of the idea and outcomes.

- Shared Values
- Common Mission
- Aligned Vision

Theory of Coalitions

Policies get changed because of a Coalition

Programs get done by Committees

You are very easily dismissed as a special interest group or a cranky person if you do not have outside validators.

Coalitions are among equals. Libraries tend to ‘serve’ and not see themselves as equals.

Theory of Coalitions

There are only two kinds of coalitions and neither are about the library:

- Common Concern for a Population
- Common Cause about a Place

“Coalitions allow you to advance your agenda by making it part of other agendas.”

Theory of Coalitions

Common Concern Coalition: Is less about the "where" and more about the "who."

Libraries form coalitions with organizations, agencies, and groups based on shared concerns for specific populations who are also served by those stakeholders.

Common Concern (For a Population)

- New to Town
- Homebound
- Young Children
- Job Seekers
- Homeless or At-risk
- Veterans and Military Families
- New moms

Who Else Cares about a Population?

Common Cause Coalition: This type of coalition is formed when associated organizations rally around a specific issue or localized concern.

The primary bond (within the Coalition) is the shared issue or a focus on pride of place.

Common Cause (Place or Idea)

- Economic Development
- Workforce and Re-tooling
- Grade Level Reading
- COVID-Slide
- Housing and Food Security
- Safety and Violence
- Well-being

Who Else Cares about Place?

What systems exist in your community that align with libraries? Where are your natural partnerships? Who are you regularly frustrated with?

- State and Local Work Groups
- Boards and Commissions
- Councils, Task Forces
- Forums, Caucuses
- Initiatives, Alliances

Find an Existing Coalition

Coalition Cautions:

Don’t confuse ‘project partners’ with coalition partners.

Don’t conflate ‘sponsors’ with ‘coalition partners’

Don’t let your hope that ‘should be partners’ want to be partners.

Do you have the funding, staffing, and authority to act to realize your mission, vision, and values?

What Do You Want to Get Done?

Who Do You Hand Out With?

Moving into Marketing

- “Marketing Tomorrow” build use
- “Marketing Yesterday” builds support
- Programmatic Partners are unactivated allies
- Coalitions are core to advocacy campaigns
- You are the only expert on libraries and librarianship.
- You must define the negative.

Advocacy Principles

- Marketing *tomorrow* to encourage use and uptake.

- Marketing *yesterday* to tell the story of your impact.

- Spend a few dollars and a few minutes every day to do it.

Marketing

Social Proofs Validate You:

- Social Proof is a Shortcut to Information or Behavior.
- Social Proof is an Endorsement.
- Social Proof Tells Me Right and Wrong.
- Social Proof Works Best when it Comes from Peers.

Use external validators in your marketing, not just lists of activities.

Social Proof Marketing

Your “Book” Carries Your Values, Vision, Mission:

- Strategic Plan
- Building Plan
- Technology Plan
- Budget
- Annual Report

Coalition 101: Boards

Empowering Staff to Carry the Message:

- Your own values about libraries?
- Your own vision for your community?
- Why you do this work?
- What happens if you don't?

Coalition 101: Staff

Talk about Plan B and Plan A

- Plan A = what happens if we are properly funded or empowered
- Plan B = what happens if we are under-funded or disempowered

Then please stick to it.

Experts Must Define the Positive and the Negative

Is your library's budget in line with your own values? And with the values of your community, your funding partners, and your elected officials?

If it is not, perhaps it's time to rewrite the budget.

Budgets Express Our Values

How Does This All Line Up?

Final Thoughts from the Dread Pirate Roberts

Well, Roberts had grown so rich he wanted to retire, so he took me to his cabin and told me his secret.

- I am not the Dread Pirate Roberts, he said. My name is Ryan. I inherited the ship from the previous Dread Pirate Roberts, just as you will inherit it from me.

- The man I inherited it from was not the real Dread Pirate Roberts either. His name was Cumberbund.

- The real Roberts has been retired 15 years and living like a king in Patagonia.

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Three Languages of Politics

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Political Decisions

Directly or indirectly, how we choose to tax ourselves and what values are expressed in our budgets, policies, and programs are fundamentally political in nature.

How do policies, budgets, and laws reflect and express our values?

There are three mainline political narratives we operate within (see: “Three Languages of Politics” by Arnold Kling, Cato Institute 2016)

My heroes are people who have stood up for the *underprivileged*.

The people I cannot stand are the people who are *indifferent* to the oppression of women, minorities, and the poor.

Progressive

My heroes are people who have stood up for *Western values*.

The people I cannot stand are the people who are *indifferent* to the assault on the moral virtues and traditions that are the foundation for our civilization.

Conservative

My heroes are people who have stood up for *individual rights*.

The people I cannot stand are the people who are *indifferent* to government taking away people's ability to make their own choices.

Libertarian

Disrupt / Dismantle

My heroes are people who have put their foot down and said enough is enough….

My heroes are people who have taken back their rights….

My heroes are people who are champions for their beliefs…

New 4th Language of Politics

People become activist for many reasons, but with anti-censorship and anti-discrimination campaigns, they tend to come from one of three values and identity groups:

a) Civil Liberties
b) Civil Rights
c) Civil Society

Rooted in Ideals