



Values-Aligned Budgeting:

Framing Your Library's
Funding Request for the post-
COVID Era

Colorado State Library

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EveryLibrary Institute



EveryLibrary | 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



Good Neighbors

- Austerity mindsets lag economic growth.
- Highly volatile budget situations lead to conservative spending plans.
- The “One Time Money” excuse.
- The budget needs to be re-written by the experts.

Disrupted Budgets

- “Third-Place” narratives are very difficult during COVID.
- Virtual, Digital, and Online measures of impact are needed.
- ‘Nice to have’ features or services vs. ‘Must Haves’
- New revenue is needed.

Disrupted Advocacy

- Local Government
- Donors to Foundation and Friends
- Grantmakers
- Philanthropy
- Smarter Debt
- Voters Themselves

*Who Are Your
Funding Partners?*

What are the agendas of your elected officials - and how does your library map to those agendas?

- Interesting Places
- Thriving Places
- Prosperous Places
- Avoid Duplicative Services
- Deliver Efficient and Effective Services

*Understanding
Local Government
Agendas*

- Coming through the COVID crisis, donors, grant makers, and philanthropic funders want to see their money go to effective programs and competent staffing in ways that deliver results.
- They want to support programs and projects that can be measured and justified through data as well as stories.

Donors, Grant Makers and Philanthropy

- Your library is a legacy anchor institution. It is able quickly to operationalize new programs and services that are aligned with the educational, economic development, social-cohesion, health, and equity needs of the community for recovery.
- They are looking for the right way to apply donor dollars and resources to solve problems.

Donor Priorities

- The economic impacts COVID shutdowns on tourism along with energy-sector slowdowns will most hurt the people that libraries serve every day.
- However, users are different than supporters. The value-proposition for supporters isn't about what they get. It's about what the library does.

*Your Neighbor's
Priorities*

What is the role of your board in relation to local government, the donor community, and your neighbors?

- Caretaker?
- Advisor?
- Enactor?

*What Is Your Role
in Town?*

- Governance Board – directs activities; accountability systems in place.
- Policy Board – focused on the policies that guide decisions rather than governing directly.
- Advisory Board – supports a strong director; roots its activities in their outlook and experience.
- Working Board – small-staff supplement; project-driven, activity-oriented.
- Planning Board – focused on future goals; strategic, financials, facilities, elections, managed change.
- Interventionist Board – acting in the interests of the appointing authority.

*What Kind of
Board Are You?*



*Supporters
are not
Users*

How people listen

Four ways that people are wired to care about... anything.

- 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

Why people listen

Four factors that build parties and movements

“The Political Brain”
by Drew Westin (2008)

- Shared Values
 - Does the campaign or candidate align with my deeply-held belief(s)?
- Shared Identity
 - Does the campaign or candidate represent me in some way?
- Personal Characteristics
 - Do I like the candidate or admire the campaign?
- Specific Policies
 - Will the candidate or campaign do what it says when I am not looking?

Who are Potential Supporters

Why someone is motivated to act on behalf of an ideal

- Relational Supporters
 - “Knows” libraries and librarians
- Ideological Supporters
 - Aligned with what librarians and library workers do
- Aversion Supporters
 - Would like to avoid bad outcomes based on principals or ideals
- Access Supporters
 - Motivated by feedback, praise, or gratitude

Stories that Resonate

Four potential approaches to root your conversation

- Stories of Success demonstrate your competency
 - Scale or replicate
- Stories of Failure demonstrate your integrity
 - Avert or fix
- Stories about people you care about
 - Find a common concern
- Stories about why you do what you do
 - Find a common cause



*How We
Talk About
our Work
Matters*

Funding for libraries is a political decision.

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.

Political Decisions

Three Political Narratives

- Progressives
- Conservatives
- Libertarians

"Three Languages of Politics" by Arnold Kling

*The stories we like
to tell ourselves*

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

What happens when you are variant from or at odds with your audience, your funding partner, or your decision-maker?

You and your team

vs.

you and your audience

A Pause for Questions, Comments, etc...

Please use the chat box



*Who Else
Cares?*

Theory of Coalitions

Coalitions are focused on funding or policy, not programming or services

Funding-focused coalitions are based on a shared set of values, a common mission, or an aligned vision.

The question of “who else cares” drives decisions on who to engage

*What do we
share “In
Common”?*

- Common concern for a population
- Common cause about a policy
- Common investment in a place
- Common approach to a crisis

Who Else Cares

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

Board Work

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

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

Staff Work

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?

How Do We Engage?

- Reach out in the way they want to be contacted. Be personal and not just personalized.
- Always say: “May I share with you what is happening at our library right now?”
- Open with the story of “why we are doing what we’re doing”. Not a laundry list of activities.
- Partners want to know what's going on and they want to know how they can participate.



Rewrite the Budget

Is your library's budget in line with your 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
Values*

“New” Money only comes from four places:

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

*Rewrite the
Budget*

- “Marketing Tomorrow” builds use; “Marketing Yesterday” builds support.
- You are the only expert on libraries and librarianship, and you must define the negative.
- Coalitions create success
- No one will solve your budget or policy issue for you.

Activating the Value System

- 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

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*

Questions, Comments, and Wrap-Up

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