



From Stories to **Action:** How to Talk about Your Budget to Activate Support and Secure Funding

Wisconsin Trustee Training
Week 2022

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EveryLibrary



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

- Election Days and Negotiations
 - Support for Legislative Agendas
 - Outreach and Activism to the Public
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EveryLibrary Institute - 501(c)3 Research and Policy Think Tank

- Research Agenda
- Training Programs
- Programmatic Partnerships and Coalitions



Please Put Questions and
Comments into the Q&A
Box for Jean...



*Late-Stage
COVID
Funding
Framework*

What Funders Want

- Coming through COVID, policymakers, elected officials, voters, 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.
- They are looking for the right way to apply funding and resources - whether taxes or philanthropy or grants - to solve problems.

Disrupted Narratives

- “Third-Place” narratives were very difficult during COVID.
- Traditional services that went unused during COVID may be questioned.
- Virtual, Digital, and Online measures of impact are needed.
- ‘Nice to Have’ features or services vs. ‘Must Haves’ is a negotiation.

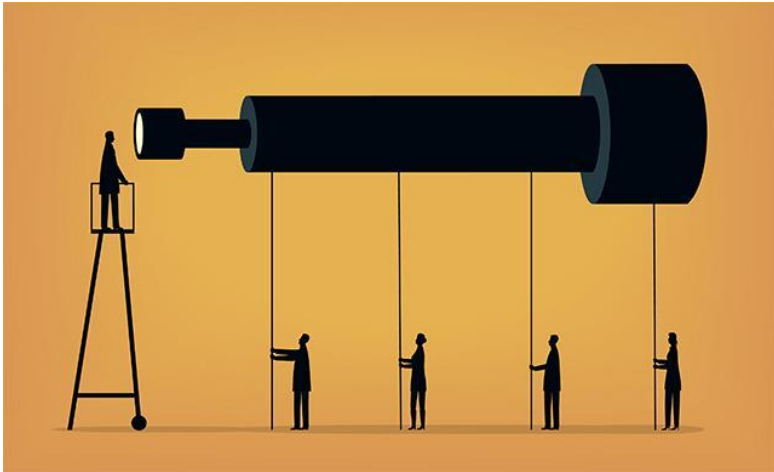
Disrupted Budgets

- 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.
- New revenue is needed.

Disconnected Priorities

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

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



Telling the Right Story

The “only story that matters” is one that is targeted to and actionable by your audience

Conventional Wisdom

Storytelling in library advocacy
must be reconsidered in light of
current data and best practices

- A. People respond to stories
- B. Focus on your patrons /
customers' stories
- c. Avoid being "data heavy"
- D. Get them into your library
and you'll win

Break with the Conventional Wisdom

Communications about taxes
and donations are not a sales
transaction

~~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.



Political Frames for the Story

Funding for libraries is a often political decision:

- Shared Values drives Politics
- Aligned Vision drives Programs
- Common Mission drives Donors

Advocacy only works when you solve your own problems.

A Theory of Library Funding

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 Political Values

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 Political Values

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 Political Values

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

*You and your
team
vs.
you and your
audience*



How Humans are Wired

Heuristics at work

People are wired to make decisions in certain ways and overcoming those decision making tendencies is very difficult.

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

Types of decision making

From politicians to donors to voters, the pre-campaign campaign matters more than we often think

Start your advocacy prior to a time when decisions are 'forced'.

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

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 they?

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 principles or ideals
- Access Supporters
 - Motivated by feedback, praise, or gratitude

Four types of constituents or voters

How they show up on Election Day or to a political decision is not related to their user status

OCLC 2018 "From Awareness to Funding"

- Believers - 27% nationally
- Questioners - 31%
- Suspicious - 21%
- Never Going to Vote for You - 21%

This is down from 37% Believers in 2008

What do they care about?

Only one of these is a reason to fund your program

- Stories of Success demonstrate your competency
 - Scale or replicate
- Stories of Failure demonstrate your integrity
 - Avert or fix

Who validates your ask

External but not spontaneous

Social Proofs are Heuristic Cues

- Experts
- Users
- Celebrities
- Crowds
- Peers



A Pause for Questions,
Comments, etc...



Motivating and Messaging

- 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

Funding-Focused Partnerships and Coalitions are based on:

- Shared Values
- Common Mission
- Aligned Vision

*Coalitions are
Focused on
Funding or
Policy Not
Programming or
Services*

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

Who Else Cares?

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*

What are the agendas of your elected officials - and how does your work intersect with those agendas?

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

Understanding Your Boss's Agenda

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*

Talk about the impact on Plan B and Plan A on people and places:

- Plan A = “So that we can...”
- Plan B = “It means we can’t (or won’t)”

*Define the
Positive and the
Negative*

Stories to tell library users:

- As you know....

Stories to tell non-users:

- As you can imagine

Remember: How they listen
determines if you are heard

*It is Not About
Making More
Users*



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