

**Missouri Public Library
Levy Campaigns:
My Experiences and Advice
for Directors**

by Michelle R. Mears
...with help from countless others

2021



With 2024 Appendix,
Including Campaign Opposition

Missouri Public Library Levy Campaigns: My Experiences and Advice for Directors

by Michelle R. Mears

...with help from countless others

Last Update: June 2024

Chapters

Introduction & Acknowledgements

- 1. Free public libraries are not free**
- 2. Districts, boundaries, and voters**
- 3. The County Clerk is your new best friend**
- 4. Types of campaigns and political rules**
- 5. How early is too early?**
- 6. Getting help**
- 7. Words matter: choose wisely**
- 8. Timeline of a campaign**
- 9. Get out and talk to people**
- 10. If you're not with us you're against us**
- 11. Why are we doing this again?**
- 12. E-Day and the aftermath**

APPENDIX-Campaign Opposition

List of Resources

Introduction & Acknowledgements

As I was going through a levy campaign for my library in 2019, I went through a whole range of emotions. I was scared, angry, stressed out, frustrated, and generally lost most of the time, trying to figure out what I was supposed to be doing and how I could best help my library have a successful campaign. Most libraries do not conduct campaigns very often. It is rare for a library director to conduct a campaign more than once in their career.

Because not every director has to do a levy campaign, and because the process itself is so stressful, not very much is written about it specifically to help a director through the process. It is very difficult to lead when there are no clearly written rules to follow, and many of the rules are designed to restrict what a library director can say and do during a campaign. I decided early on in the campaign process that I needed to write a guide when I was done so no other director had to go through what I did during the campaign. In the end, it turned out to be more of a memoir than a manual.

Some things don't make sense until looking back on a process. I hope this publication helps at least one library director feel they are not alone and that they can be confident throughout the campaign that they are doing their best on behalf of their library staff, board, patrons, and communities.

This publication makes some assumptions about your Missouri public library. One is that your library is operating as an independent political subdivision of the state of Missouri with your own legally established tax levy. If you are a municipal or county library that has entangled your operations with your city or county, by letting them manage your funds, pay your bills, oversee your HR and staff benefits, or otherwise be involved in the administration of your library, then you may need to add that layer in throughout your levy campaign process. Your board may not feel empowered to act independently from the city or county government. I do not have experience with this, so I can't speak to it but you are the only one who knows the main players in your arena. Be transparent and inclusive, but also strategic and circumspect. Only include those who "need to know" when you must. Too many chefs can spoil the broth.

The levy campaign process takes quite a bit of work, so it should not be entered into lightly. There are many sources of advice, strategy, and choices that you may come across, but the one thing to remember is that you are never alone and advice is just a phone call or email away. But also remember that each situation is somewhat unique, and only you know your own community. Consider as well what other entities have asked voters for funding

recently, and how your request might look in relation to the overall tax burden on residents.

I want to thank the following people who assisted me during our campaign and who helped provide information and shape my thoughts to write this publication:

Patsey McGuire, Rolling Hills Library
Steve Potter, Mid-Continent Public Library
Mary Beth Revels, St. Joseph Public Library
Steve Campbell, Scenic Regional Library
Rochelle McCaulley, Kansas City KS Public Library
Tony Benningfield, Jefferson County Library

Chapter 1

Free public libraries are not free

Public libraries in Missouri are primarily funded by property tax levies passed by voters in a geographic region. A few (and growing number) have a sales tax as all or a portion of their levy. Depending on the type of tax and the amount, a library may need at some point in its existence to go to the voters of its district to ask for a levy increase. One of the first issues to address is educating your communities about the fact that while libraries are mostly free to use, public libraries are not free to operate.

There are two kinds of property tax levies for libraries, operating and capital. This publication mostly refers to operating levies. A capital levy or bond issue is a limited property tax for a set number of years to construct or improve buildings for the most part. You see schools using it more often, for buildings but sometimes also for technology. It's like taking out a mortgage to buy a home. When you are done paying off your debt the loan payments stop so you have no need for the tax any more. What usually happens is by the time the bond is paid off the building is worn out and needs updating and the library is stuck trying to fund those updates with operating funds or reserves. Bigger buildings cost more to operate and you may need more staff, so take this into account if you are thinking about a capital vs. operating levy.

Many members of the public are completely unaware that libraries are funded by taxes. They also don't know that we have to purchase books (some think that they are donated by publishers or just donated by the public). And like public schools, the fact that we end up paying more for staff and for buildings than we do for collections and resources is a hard pill to swallow for many taxpayers. They think all the money should go to the collection. They don't know that the largest part of all library budgets (50-70%) goes to staff and benefits, just like they don't understand that paying teachers is usually the biggest part of all school budgets. A modern

public library is not run by volunteers and does not have a collection made up of donations. Exactly how much money you need to run a library is determined by many factors.

Before embarking on a library levy campaign, you should have a really good handle on your budget. Have at least eight years of expenditures on hand as well as your current and most recent budget. Before you can work with your board to decide whether or not to request a levy increase, you need to know why you need that increase and what you plan to spend it on. Inflation is a real concern, but you do not want to ask for a levy increase to just catch up but to be comfortably funded and have a reasonable amount of reserves. If you are planning a building project, get some general figures to consider for costs per square foot for renovation and/or for new construction. But this publication does not go into detail about the differences between an operating levy and a bond issue, so you should know the difference between the two and what you are asking the voters for. You CAN do building and capital projects with an operating levy, so explore the differences thoroughly before making a decision.

You do not want to go to the voters very often to ask for a tax increase, so plan accordingly. Do not ask for so small an amount that you need to go back to the voters sooner than 10 years. Be prepared to answer questions about whether the amount you are asking for is enough for the library's needs. The

Missouri State Library has set a minimum operating levy amount to be eligible for state aid, but this is a threshold and not a ceiling. Many libraries with a smaller tax base will find it is not nearly enough to operate comfortably. Some will advise that you need a full blown strategic plan before starting your campaign. We did not do this, but the board did some “visioning” work to talk about the future needs of the library and the community. You should at the very least have a good mission and vision statement and be prepared to answer how the levy increase you are asking for fulfills that mission. Most libraries do this with a (bullet) list of what you plan to do with the funding.

Although this seems to only affect two libraries in Missouri that I know of, I want to talk briefly about sunset clauses. If anyone associated with your campaign talks about adding a sunset clause to an operating levy, smote them with lightning from the sky. Sunset clauses are sometimes added to operating levies as a way to force an entity to keep going back to the taxpayers with hat in hand, couched as an “accountability” clause so action can be taken if the voters are unhappy. It is almost impossible to do complete strategic planning if some significant portion of your budget might evaporate every 20 years. But if you are stuck with a sunset (as my library is, alas), then use it to your advantage and in your campaign to say that you are not asking for an increase but a renewal and that you

appreciate the periodic input of voters, etc. If it is mentioned as an option in your community, ask for a little less if you must but do not add a sunset clause just to get something passed.

In review...

- **Libraries are not free. Staff costs are the biggest portion of all library expenditures.**
 - **Know why you are asking for more funding.**
 - **Consider both the short term and long term funding needs of the library.**
-

Chapter 2

Districts, boundaries, and voters

Most public libraries have clearly defined districts and boundaries. Cities and counties have lines on maps that people can see and understand. Some libraries, however, have a somewhat vague notion of the outside edges of their territory. If your district touches another district, there will likely be some boundary issues. And reciprocal agreements can blur these lines. Early in campaign planning, it is beneficial to review your district boundaries and the demographics of your voting population.

Use the usual sources for demographic data. These include Census sites, local or regional economic councils, chambers of commerce, and

other websites like moving or cost of living sites. Don't reinvent the wheel. If your boundaries are the same as a city, county or school district, ask those entities for their demographics.

If you haven't looked at these recently, you could be in for an awakening. A library that for years focused on large print for elderly residents found out they were ignoring the growing population of young families with children. A change in programming and collection development brought a significant increase in foot traffic and attendance. Which could then be used in press releases and media attention long before a levy issue comes up. Good marketing is always important for laying the groundwork for media coverage that you want to remain positive towards the library. Knowing your community is very important in preparing for a levy campaign.

Knowing your boundaries will help you focus precious campaign dollars on people who are able to vote for your issue. You might promote the library to all area residents who are eligible to get a card and use your services, but you want information about your levy to go only to voters. Don't advertise in newspapers that are mostly delivered to people outside your district. Bulk mailings go by zip codes which do not always align with library boundaries. If there are any questions about your library district boundaries, be up front and very clear about where

the lines are and who will be eligible to vote on your issue.

Voters are the only ones you care about during a campaign. You can blanket the media, tell all the best library stories, and promote the library and its resources until the cows come home, but it makes not one bit of difference unless you reach voters in your district and they are motivated to get out on election day. And do not confuse library users and library cardholders and with registered voters. Library users may be more likely to be registered voters (according to some pollsters), but some of your biggest supporters will be people who never cross your library threshold. They like the *idea* of the “library” and recognize the importance of a library to a community. But they never use it themselves. These are the people you need to donate to the library and support your campaign.

You can get a copy of the registered voters in your district from your county/city clerk. There may be a fee, and different counties charge different amounts. What you get in the file (usually on a CD-ROM or maybe an emailed file) can vary widely, there is no single standard for the output of a registered voter list. If you are lucky, it will not only have names and addresses but polling places and a history of voting behavior. This can help you concentrate your campaign efforts on “likely” voters and outdoor things like yard signs and door knocking in precincts where you can have the most

impact. You can tailor your list and not try to blanket the district with a mailer that goes right to the recycle bin in most households.

In review...

- Take some time to gather demographics.
 - Know the geography of your district.
 - Focus on library supporters and registered voters.
-

Chapter 3

The County Clerk is your new best friend

All ballot issues and candidate campaigns are run through the local office of the county clerk. For simplicity, I will just refer to this position as “Clerk” for the remainder of this publication. If you are lucky, there will be only one Clerk you will have to deal with. If not, there may be multiple Clerks in multiple jurisdictions you will have to deal with. This is why you need to be fully versed in your library district boundaries to know exactly who you need to be in close contact with.

You will file the resolution from your board with the Clerk’s office. This officially starts the campaign as soon as the vote is taken by your board, which is explained in more detail in the next chapter. The list of deadlines to file can be found at

the Missouri Secretary of State's website, but your Clerk should also have these dates available. It is a good idea to let your Clerk know in advance of filing the resolution that a levy issue is on the near horizon.

The Clerk can give you an estimate of the cost of the election. Any and all entities with ballot issues are required to pay costs to open polling places and print ballots. You can and should pay this cost with library money (tax dollars). Many libraries choose an "off" election date to be a single-issue ballot and (so they think) increase the chances that "no" voters won't bother to get off the couch. Other libraries have challenged this opinion and successfully won levy issues during the highest turnout election date, a presidential November ballot. Be prepared to consider election costs and election dates early in the process.

You also request the list of registered voters from the Clerk and can for an additional fee get an ongoing update of new registrants and people requesting absentee ballots for your election. Newbies and absentee voters are highly likely to vote, so you could direct some campaign literature to this group but not if you don't pay for this information. You cannot tell from a voter registration list which party a person affiliates with, but conservatives and liberals are equally likely to support a library tax levy, so don't prejudge your constituency. In the next section about types of

campaigns this will make more sense, but you cannot use tax dollars to buy a voter registration list and then give it for free to an advocacy (vote yes) campaign. It is better for each side to buy their own list if you plan to do any marketing or targeted mailings with this information. Better to be safe than sorry with campaign finance and ethics commission rules.

Throughout the levy campaign, you may need to stay in close contact with your Clerk. Your library should already have a relationship with your Clerk for annual paperwork filings regarding tax collections and setting levy rates. If it is not the Director, make sure the library staff person who already has this relationship continues it during the levy campaign. This is not the time to introduce a new name and face to the Clerk's office if you can help it.

In review...

- **Get to know your county clerk(s).**
- **A levy issue will cost the library money to put on the ballot.**
- **Weigh the cost/benefit of being a single issue ballot.**
- **Confirm, and then confirm again, all deadlines with your county clerk.**

Chapter 4

Types of campaigns and political rules

There are two types of levy campaigns and you must understand the differences before you begin. An **information campaign** is one that only provides text and pictures about the library and about why the library needs more funding. It never says "Vote Yes" and only says "Please Vote." It can refer to library needs, even pie-in-the-sky dreams for the library, but it cannot say that anyone should support, carry, pass, embrace, love, or otherwise feel positively about the library or library ballot issue. You can have a list of what will likely happen if voters vote Yes and what may happen if voters choose No. This list ought to be factual and dispassionate about the impact on the library of this levy funding issue. You can and should put information campaign content on your library's web site. Tax dollars and staff time can be used on an information campaign, but everyone should be hyper-aware to not promote voting yes for the issue in the library building or anywhere on library property or on paid time.

An **advocacy campaign** is one where you tell people to VOTE YES on your ballot issue. It is sometimes also referred to as a Yes Campaign. This is where you see yard signs and TV commercials and other promotions that go beyond get out the vote (GOTV) and are strongly advocating for the levy.

This is where you might ask for endorsements of your ballot issue from prominent local residents. If you do an advocacy campaign you must form a campaign committee with a treasurer who is responsible for online filings and whose name along with the committee is listed on materials produced for the campaign. Advocacy campaigns cannot use public funds and must use donated money. An advocacy campaign also needs to apply for its own Federal ID Number in order to open a bank account. Do this first because you will need the bank account information to register with the MEC. All donations must be reported to the Missouri Ethics Commission for public disclosure, and within a limited time period or penalties are assigned.

You can do both an information campaign and an advocacy campaign simultaneously. Some libraries choose to only do an information campaign and use library funds to do so. I think more rarely a library would do an advocacy-only campaign, because staff and others still need to be able to answer questions about the ballot issue and library administration needs to create those materials to make sure all the staff are on the same page. So even if it is only in-house, you are still researching and putting together an information campaign.

Even though it may feel like you do not have time for it, take this opportunity to look at how you market the library in general. If you do not have a

modern, attractive logo, you may not have time to fix that, but otherwise any library brand awareness activities you can do during the pre/during/post campaign are valuable. We started running TV commercials in the 4 months before the election. They had nothing to do with the levy issue, but were just generic commercials promoting the library and specific things like our passport service and the bookmobile. We ran Facebook ads for the summer reading program, which was right before our August election date. We did email blasts about the library's online offerings before we did an info campaign email. You don't want your community to think you are only in their faces to get a vote. We kept up our TV commercials for 6 months after the campaign, and then let them lapse a bit due to the pandemic but have recently picked them up again. Marketing the library is important all the time, so if you decide to boost your marketing right before an election make it clear that it is not part of the campaign but you will benefit from the increased brand awareness.

A library director must straddle both worlds in a levy campaign. During work hours the director must be careful to phrase discussion about the levy as information, but afterwards can knock on doors or participate in social events put on by the advocacy campaign. Directors are usually exempt employees, meaning they are not subject to overtime rules, but that does not mean that you are a library employee 24-7. Use care, and always pause and think about your audience and setting before

talking about your ballot issue with information or advocacy wording.

Your committee might decide to hire a firm to assist with the advocacy campaign. These are the same firms that help candidates for office run their campaigns. They can create graphics, register a website, help with an online donation form, discuss strategy, create and send a campaign postcard, and a myriad of other activities. But everything has a price and then your committee will have to raise the funds to purchase all those components. If you don't hire a firm, do you have volunteers with graphic design experience or who can come up with a good slogan? Sometimes it is worth every penny to have someone from the "outside" help you frame your campaign message.

It cannot be stressed enough the division between spending public tax dollars and private donations in a levy campaign. You cannot use public funds to advocate for any candidate or ballot issue by law, and that includes your own ballot issue. Do not even make a photocopy for "free" for your advocacy campaign on a library copier. There are citizens who take the law very seriously and who may be watching for any misstep in your campaign. And the advocacy campaign must account for all income and expenses, so if they mailed 500 flyers out but have no postage expenses, who do you think they will come looking for to explain how those

items got in people's mailboxes? Possibly the library that has 500 impressions on their postage meter around that same time? Keep expenses and activities separate, and don't cross the streams (for those who appreciate a good Ghostbuster reference).

How much money is needed for a good advocacy campaign is hard to calculate. Your advocacy campaign may have to solicit funds from individual donors, and this takes time and effort. Donors need time to consider and can't be pressured to give. Levy campaigns can also be funded by a library's Foundation if there are unrestricted funds available. Many times these funds are in an endowment that can't have withdrawals, but the earnings on the endowed funds should be available if they have not been rolled over into the principal.

We were lucky enough to get our Friends of the Library to donate the majority of the funds, and then Board members and a few staff members donated small amounts, including myself. Nothing says commitment like opening your wallet. BE AWARE however that you do not want your Friends or Foundation to endanger their 501c3 status by donating to an advocacy campaign. These organizations can elect to use the 501(h) measurement by filing IRS form 5768 which will allow up to 20% of an annual budget to be spent on lobbying and advocacy, or higher amounts based on income. There is also an "insubstantial part" measurement, which is less clear. Be sure to

research these options fully before asking your Friends or Foundation to support an advocacy campaign.

Running a campaign in Missouri is not hard, but you must know the rules. The keeper of the rules is the Missouri Ethics Commission. I can't possibly replicate all of the information on their website, but you should bookmark it and read everything they have to offer. I also found it useful to search campaign finance filings for other library levy campaigns and see what was done by others, who they got donations from, etc. Be aware, however, that savvy reporters also know how to search this information and may try to trip you up with questions about your funding sources. People look for scandal, so make sure there is nothing to see there.

There are also many deadlines, one of which is the \$5000/48 filing deadline. Any donation over \$5000 must be reported within 48 hours to the MEC, or the penalties are steep. We got caught up in this because the biggest donor was our Friends group and our committee treasurer did not file for a week and a half and it cost us around \$600 in penalties. There are no waivers or mulligans in campaign finance. Even if you think you have an experienced committee treasurer who has done a candidate or issue campaign before, as director you should watch the deadlines and follow up. Any

errors will reflect poorly on the library, the public makes no distinction between the library and an advocacy campaign committee.

In review...

- **Two types of campaigns, information and advocacy.**
 - **Consider hiring a firm for an advocacy campaign.**
 - **Missouri Ethics Commission enforces the rules for both candidate and issue elections.**
-

Chapter 5

How early is too early?

Never. It is never too early to begin levy campaign planning. The time will go so fast, even when you think you have allotted enough time it will run out before you are ready. If you have the slightest inkling that your library will need to consider a levy increase in the next 10 years, start talking to your board about it. Even if they will all term out before a levy issue comes to the ballot, talk to your board about it. Former board members can and will be one of your biggest support groups and they are not bound in the way that current board members might feel they need to be more reserved in their public life outside of the board.

There is a difference between a levy planning process and the active campaign. Most active campaigns are only 2-4 months in length. This chapter is only talking about the planning process and how much thought, effort, and discussion needs to take place long before you choose an election date and officially get on a ballot.

You also want to give your staff as much time as possible to get familiar with your campaign messaging and get comfortable with the facts and figures. Creating materials like brochures or FAQs helps the public but also helps the staff answer questions and feel like they are part of the process.

When I came on as director and I learned we had a sunset levy that was expiring in six years, I talked about it at every staff training meeting so they understood that good customer service could mean the difference between Yes and No votes. I also did an exercise that I called “Circle of Influence” where I asked staff to think about their family and friends and how many people they could directly ask to vote yes for the library. (This was LONG before our campaign began; the restrictions on public funding don’t prevent you from talking about yes and no votes for a hypothetical election.) Getting people to activate their Circles of Influence is an important part of getting out the vote in favor of the library’s ballot issue.

In review...

- Never too early to start levy planning.
 - Getting staff and the board to reach out to family and friends is important.
-

Chapter 6

Getting help

Remember in the beginning when I said I felt that I was all alone and had no help? Well, that's not exactly true. I called and e-mailed as many Missouri directors as I could find who had done recent ballot issues. I talked to people at EveryLibrary, the national library advocacy group.

Two books by John Chrastka and Patrick Sweeny are on your must-read list. Buy your own copies so you can highlight and mark them up everywhere, and you won't have to worry about due dates. They are listed in full at the end of this booklet. *Winning Elections and Influencing Politicians for Library Funding* was published in 2017 and *Before the Ballot: Building Political Support for Library Funding* was in 2019. I feel very lucky that these came out right before my ballot issue timeline, because I could not have had a better introduction to politics and libraries. Together these authors have also founded EveryLibrary, a not-for-profit group

dedicated to helping libraries secure the funding they need. They do fundraising to help super small libraries do things like buy yard signs or print flyers in their levy campaign, and they are happy to just talk on the phone (for free!) if that is all you need.

Read these books all the way through, and probably in chronological order. They got better and more focused in the second book but the overview in the first book is still worth it. *Before the Ballot* starts out with a bunch of stuff about the 2008/2018 studies done by OCLC and ALA about awareness and funding for libraries, but don't let this scare you. In my opinion, you cannot determine a trend from only two data points. In 2008, it was before the housing crash and in 2018 the economy still wasn't all that whippy for most people, so a downward trend should not have been a surprise. You do have to understand that an awareness of national issues is important, but all politics are local. I am not going to repeat the contents of these books. Just read them. Maybe more than once.

You have to know where you have been to know where you are going. Do your homework on your own library history. When was the last time you asked the voters for funding? What was the turnout and result? What can be learned and fixed from previous wins/losses? Don't overlook other local ballot issues and their impact on your election. If your community has voted down every single tax

increase in the past 10 years, figure out why and then be ready to say how yours is different. If they always vote yes for education levies, figure out how to play up the educational aspects of your library.

There are no stupid questions. It's okay to preface your question with, "I've never done this before..." In fact, that phrase can also be used to get you out of a tight spot as well. I can't guarantee your county clerks will be 100% right all the time, but that is a good place to start. Then you might move to other library directors, or even contact EveryLibrary for some advice. Long term staff who might have been there during a previous levy campaign may be a good source of information. I might hold off on contacting the MEC if it is a filing or ethics question until you have asked a few other people. No need to alert the SWAT team for a cat in a tree.

You do want to have access to an attorney, and one who is experienced in Missouri ballot issues. The MPLD law firm has been around this block a few times, and as a member you get one free question per year so you might use that chip for your levy question. See the next chapter on "Words matter" for how the exact wording of your ballot question is of the utmost importance. Since the questions asked will likely be about the levy language or other processes related to the election, these are usually not part of the advocacy campaign and should be paid for by the library with public dollars. I can't imagine why the campaign

committee would need legal advice, but if it is just about their activities or specifically donations or MEC filings, then the committee ought to pay the bill from donations.

In review...

- **Two books you must absolutely read.**
 - **There are no dumb questions.**
 - **Keep a lawyer on the front burner.**
-

Chapter 7

Words matter: choose wisely

The requirements for ballot language regarding tax issues are pretty clear in Missouri, but not every entity follows the rules. What I mean is, there are good reasons why you want to be very particular about the wording of your statement. This is when you definitely want an attorney to review your proposed language, though the ultimate decision is made by the board when they pass their resolution. RSMo 182.650 states that the ballot wording for a consolidated library should be

Shall there be a _____ cent tax increase over the _____ cent tax per hundred dollars assessed valuation for the _____ consolidated public library district?

It is essentially the same for all types of libraries in Missouri. As we know, ballot language is often

embellished beyond this to get more details in there for voters to be more likely to support the issue.

Here are some samples of ballot language that may or may not meet the state law requirements:

For the purpose of renovating and replacing aging Library facilities, enhancing spaces, safety and programming for children, seniors and families, expanding services, access to computers and collections to serve public demand, and for the general operation of public libraries, shall the Board of Trustees of the ----- Public Library District be authorized to levy an additional eight cent (\$.08) tax over the present property tax for the free public library?
(November 2018)

Shall the ----- Public Library be authorized to continue to levy the \$0.15 per \$100 of assessed valuation first authorized in 1999, for a period of twenty years beginning in the 2020 calendar year, to be used to operate and maintain library facilities?
(August 2017)

For the purpose of renovations and replacing aging library facilities, enhancing spaces and programming for children and adults, expanding services and collections to serve public demand, and for the general operations of public libraries, shall there be an eight-cent tax increase over the thirty-two-cent tax per hundred dollars assessed valuation for -----, known as the ----- Library?

(November 2016; note the spelled-out numbers instead of numerals.)

For the purpose of renovating and replacing aging facilities, enhancing children's spaces and youth, adult and senior programs, constructing, improving, operating and maintaining facilities of ----- Library District, and acquiring necessary property, shall the \$0.20 per hundred dollars assessed valuation tax for the Library District be increased to \$0.26 per hundred dollars assessed valuation?

(unknown election date)

Shall the ----- Library be authorized to increase its operating tax levy up to \$.15 per \$100 of assessed valuation for the 2000 calendar year tax levy and continuing for a period of 20 years to acquire, construct, improve, operate and maintain library facilities? (1999, sunset levy language)

If you do not list both the current rate and the proposed increase, you are not in alignment with the state statutes on ballot language, but as you can see many libraries have not done so. The ballot language should be approved in your board resolution, and then gets submitted to your county clerk who then sends it to the Missouri State Auditor for review as well, but none of them appear to review for listed statutory elements. Have your ballot language reviewed by an attorney and then have MULTIPLE people review it as well. You

cannot count on someone else down the line finding or correcting your typo. You have to be factual if you want to include the “purpose” of the proposed increase, but be careful because your library will be held to those words after the election by your voters. If you say “build” then, by golly, you better build something.

It is important to choose your campaign talking points consciously and deliberately. You do not want too many in a bullet list, you want to be able to succinctly tell someone why the library needs more money. It needs to be more than just, “Pay the Electric Bill” and it also needs to either evoke positive imagery about the library or conversely list what will not happen if the levy issue fails. These are factual statements that can stand on their own, or also be embellished for an advocacy campaign. These are things that all the board members should have available and be able to say without consulting a printed list. Including them in a brochure or flyer for the staff and the public also ensures that everyone is on the same page. Here are some examples from my sunset levy renewal campaign, which will be different for a permanent levy campaign:

- This is not a tax increase, just a renewal.
- The expiring part of the levy is nearly half of the library’s operating budget.
- We maintain two branches and a bookmobile.
- If the levy fails we will be forced to cut programs, hours, and services.

- We are a community library dedicated to providing learning, innovation, and creativity.

Two to five talking points are probably optimal, so people can memorize them for the most part.

Supporting documents can be provided or these points can be expanded on in a web page.

There are some camps that say you should not have any negative talking points, like saying the library will cut staff and reduce hours if the levy does not pass. I think it is important to factually state the consequences of voting NO so your constituents understand what the result might be if enough people do not vote YES. You probably don't want to lead with this statement, or repeat it unnecessarily to the same group, but you don't want to later be accused of not stating the seriousness of the financial situation the library is facing.

Not every campaign needs a slogan, but if you come up with a good one it can be a game changer. You do not usually create a slogan for an information campaign, because slogans are catchy phrases that imply the direction you want them to vote. Even if you are factually on the brink of disaster, saying "Save Our Library" is telling people you want them to vote yes on your issue and is probably considered advocacy. (Also, Save Our Library seems a bit over-dramatic if it is not in danger of falling into a sinkhole, etc.) This is where the levy committee may find the services of a

marketing firm very helpful. The firm hired by our committee came up with the slogan “Keep a Good Thing Rolling” and the clouds parted and the angels sang and we were off to the races (also a great play on words with our library name and the new-ish bookmobile).

Nothing will derail your campaign faster than a bunch of typos and misinformation. Proofread all your products, ask trusted people to use their eyes to check your work, and then proofread again. Proof everything that comes from the levy committee and any firm or consultant they hire. If yard signs get produced with an error after the committee has approved them, then the firm is not going to refund your money and you will pay double. You can never review printed materials too much before production, one extra look-see can save you a lot of wasted time and money.

In review...

- **Select ballot language carefully.**
 - **Choose talking points that are succinct and factual.**
 - **Proofread, and then proofread again.**
 - **Catchy slogans may appeal to voters.**
-

Chapter 8

Timeline of a campaign

No one can give you a fully ready campaign with a timeline. Every situation is different. There are sometimes reasons to conduct a fairly short public campaign even if the planning has gone on for many months or even years. The two books listed in the Resources section contain a lot of information about timelines, but Chapter 16 in *Before the Ballot* has the better list even if their range of times do not mesh with your experiences. If you are 6 months out and you see 10 things you should have done already, decide if they are important enough to do now or let them go. You cannot alter the space-time continuum.

Whenever you start planning, even if it is years in advance, create a document with time in the left column and activities in the right column. You can start filling it in with a targeted election date, filing deadlines, voter registration deadlines, absentee ballot deadlines, and then when it is not so bare you will feel much better about the whole process. This document will evolve over the long planning process, and you should go back and fill in tasks after the fact to keep your activity timeline all in one place.

Be sure to include “soft” targets like board discussions and strategic planning in your timeline.

If you do an advocacy campaign, include time for fundraising if needed. The public side of the campaign may only be 2-4 months. People get bored and tired of seeing yard signs, etc., if your campaign goes on too long. And yes, they may vote no just because they are annoyed. Create a way to highlight hard deadlines so you can follow up, or make the bullet points into checkboxes so you can mark off completed items. However is most comfortable for you, document your timeline and be prepared to visit it and update it often.

If you are still having difficulty getting started on a timeline, here are some suggested elements to include (not necessarily in order):

- Choose amount of levy increase to request.
- Decide on information and/or advocacy campaign.
- Form levy committee; select treasurer.
- Determine funds needed and fundraising options.
- File ballot language with county clerk(s).
- Get cost estimates for election fees.
- Create FAQ for staff and the public.
- Make web pages, flyers, brochures, if needed.
- Schedule visits with community clubs.
- List all other upcoming ballot issues or elections in the community.
- Determine library marketing outlets for info campaign.

- Decide on campaign elements, like email blasts, postcards, door hangers, yard signs, TV commercials, etc.
- Publicly launch campaign at an event.
- Prepare pass/fail statements to the public.
- Set up watchers at county clerk offices to report results more quickly.
- Plan election night watch party.
- Send press releases and thank yous.

There is so much more that can't really be listed but needs to be determined by each library's circumstances. The absolute shortest time I would guess a campaign could be pulled off is 4 months, but if you have already been thinking and strategizing for years then maybe 8-12 months would suffice.

In review...

- **You have to make your own timeline.**
- **The timeline will evolve and change over the campaign.**

Chapter 9

Get out and talk to people

Once your campaign is in full swing, you have to get out and talk to people. One of the best ways is to schedule yourself to speak at all the local civic groups you can find. Make a list of all of the clubs

and groups you can think of. They are usually scrambling for speakers for the current and next month, so hopefully you can get on their schedule. Be sure to bring not only your campaign materials but a cheat sheet of library budget figures and other facts about the library, including number of staff, square feet of the building(s), historical information, community demographics, collection statistics, or anything else you can think of. Sometimes you get an off-the-wall question and just do not have the answer, so get a name and number to follow up and add it to your cheat sheet. Here are just a few suggestions for places to speak:

- Rotary, Lions, Kiwanis, Optimist, etc.
- Chamber of Commerce
- League of Women Voters
- Democrat/Republican Clubs
- Welcome Wagon

One of the best things we did almost by accident was have myself as library director and then a board member who was on the levy committee go together to talk to public groups. This allowed us to do the good cop-bad cop routine, where I conveyed the information campaign content and then the other person could give them the hard-sell vote yes message. It was not something I looked forward to at first, but in the end it turned out to be just the right approach for us. But for most libraries, information-only visits are fine for civic and social clubs.

If you are in a media market with television, you will be asked to be on radio and maybe TV. You have to get over any nervousness, and just do it. You should also include any local newspapers or news outlets. Breathe deeply and allow yourself a pause before answering any question. Be prepared with your campaign materials to prompt you for answers. Also have recent library statistics and demographics handy. If a question comes out of left field and you do not have an answer, then apologize and offer to follow up after the interview. Never make anything up on the fly. Media interviews may seem more nerve-wracking but it should be no different than any other type of community talk you already do on a regular basis.

Direct, in-person contact with individual voters is worth its weight in gold. But it is also challenging, time consuming, and a thankless job. Knocking on doors does not have to be a cold call on houses where you do not even know if people are registered to vote. You can use voter registration rolls to target households that are most likely to vote to help reduce the chances that your knockers will encounter hostile people. Many neighborhoods and individual houses post “No Soliciting” signs and if you see these you should not knock or disturb people. But if you print up a door hanger then you can leave it on the doorknob and hopefully someone will read it later. People in general love the library, so even if you are bone tired when you are done it

will feel great when you remember all the positive comments from people you spoke with.

In review...

- Plan visits to all the civic and service clubs.
 - Prepare yourself for media interviews.
 - Knocking on doors can be very rewarding.
-

Chapter 10

If you're not with us, you're against us

Don't worry about haters and trolls. Someone will always be there to write vitriolic letters to the editor and make nasty online comments against any kind of taxes. Don't rise to the bait. Carefully consider whether you need to reply at all. It is sometimes better to let negativity stand alone, and let others come to the conclusion that this person is an outlier and not the mainstream.

Board members need to ALL be on board with the levy ballot issue. Even if they do not donate extra time to the campaign they cannot be going around telling people that they do not support the ballot issue. Libraries can lean towards having fiscally conservative board members like bankers, lawyers, or retired persons from high-wage industries. While this group is usually gung ho about libraries, they also tend to be against taxes in

general. Your levy ballot issue may put some of your board members in a conflicted state. But most if not all are there because they support the library and understand that libraries need taxes. Both current and former Board members can be asked (by the advocacy campaign) to write letters to the local newspapers in support of the ballot issue.

Staff also need to be 100% on board, whether they live in your district or not. They are an often overlooked advocacy group, but are some of the best cheerleaders for the library. But, this is where things start to get tricky. No staff can advocate for the levy issue on work time or during paid hours, and it is probably a bad idea to let hourly staff volunteer with your levy campaign on their off hours. You do not want to be accused later of pressuring staff to work without pay on the campaign.

Staff CAN advocate for the levy issue to friends and family, at church, in the grocery store, and often have the power to get out the vote with these same people and turn out more “Yes” votes for your campaign with their Circle of Influence. If for some reason you feel a staff member might be against the ballot issue, it would be worth your time to talk one-on-one with that person and find out why. Sometimes it is a misunderstanding about how the library is financed which can be quickly cleared up. Otherwise, library employees need to understand how their future employment is tied

directly to the availability of public tax dollars. I like to think that library employees are not anti-tax, government haters, but you might be surprised at how many are more fiscally conservative than you think.

The worst situation you might find yourself in is if there is organized and/or paid opposition to your ballot issue. If someone or some group forms a No Committee, registers it with the Missouri Ethics Commission, and then actively spends money to put out literature, direct mail, yard signs, or television commercials against your levy, then something went way off the rails. You might not know until one of your employees shows up at work with a nasty attack postcard they received at home. I don't have experience with this, but if it happens I think pushing your GOTV message and increasing "Yes" voter turnout may be your only hope. (Note: You can look up an opposition committee on the MEC site and sometimes find out something about them, or least who their donors are.) And cross your fingers it will be enough.

In review...

- **Don't fall for hater bait.**
- **Staff and board must all be on board.**
- **Pray for no organized opposition.**

Chapter 11

Why are we doing this again?

Relax. There is a light at the end of the tunnel. When you are the most stressed out and you are getting close to the election, take some time for yourself and do something completely unrelated to the library. If you burn out the whole thing could collapse, because we know as library directors that the buck stops here. You not only have to keep staff spirits up but you may often have to do the same for the board and the campaign committee. Smile until your cheeks hurt. Get a manicure (men or women). Treat yourself to a nice lunch. You totally deserve it.

Remember why you are doing this, because your library really needs more funding in order to serve your community well. If you and your board have worked through the process, and you have an active and enthusiastic campaign committee then you are on your way. There is only so much you can do in the last weeks before an election. If most indicators point towards a positive outcome, then keep to your mission but allow yourself to feel confident about it.

Even with a good plan and good people and a good campaign, you will still feel anxiety. It's okay, and there is an end date to the madness. Friends and family will not completely understand your stress and can only help up to a point. Some might

say, oh if you lose you can always try again in the next election. Listen, no one wants to voluntarily go through a meat grinder once, let alone multiple times. You want to do this right the first time. Use your checklists. Touch base with everyone you can think of. It will all be over soon.

In review...

- **Watch for signs of burnout and exercise self-care.**
 - **Your anxiety is a function of how much you are invested in the success of the library, embrace it and power through.**
-

Chapter 12

E-Day and the aftermath

When election day comes, hopefully you will be nervous but happy, like waiting for a baby to be born. Hmm, that might not be a good analogy. Maybe more like waiting to see if your team wins the championship. However, you should be prepared for both outcomes by writing both win and loss statements to share at the watch party and with the press. It does not mean you expect to lose, just that you will not be at a loss for words whichever way the vote goes. Review the statements with trusted staff and the campaign chairperson so they know what you are going to say.

I was not sold on this idea at first, but you should plan a watch party to gather results as they come in. It is a chance to eat and drink with everyone you worked with on the campaign and relax a little as the votes are tallied. If you can have it at a public restaurant or bar, then go ahead and do that to have someone else be responsible for the food and drinks. But if you think it will not sit right in your community you can just have it in a library meeting room. If you are not in an area where the results will be televised, then you need to make sure you have the web sites where returns are posted for your county.

We didn't do this but I wish we had: station a few trusted souls at the courthouse(s) so you can have them text you or call you with early returns. I didn't know this but the county clerks and their staff come out of their offices and report returns as the tallies are reported to them from the precincts. Of course, they are not official or certified until the ballots all get back to the courthouse, etc., but it is much faster than waiting for a web site to be updated.

When you get the final results, read your prepared statement for however it came out. Thank everyone and then go home and get a good night's sleep. Most elections are Tuesdays so you still have to work the next day. Write thank you cards to

everyone you can think of. Follow up and make sure you get the precinct by precinct results from the county clerk. You will want to analyze these results and see if there are any pockets of your district where you could do more outreach and inform residents of the benefits of the library. You also want to archive them for future directors and boards to look at when the inevitable levy increase comes down the road again. If that road is a short one because you lost the election, seek out people who voted no to tell you why. Unless you can fix it, there is no sense in going to the voters again without a new message you think will be more successful.

Finally, if your advocacy campaign did yard signs or other public displays, remember they must be taken down by a certain date after an election, and you want to get them all picked up so your campaign does not become a litterbug. Keep one or two samples of each work product or brochure. Print out a copy of the web site(s) used so you have a full record of your campaign. Someone else decades down the road will thank you for your hard work in documenting your levy campaign.

In review...

- **Prepare your win/loss statements.**
- **Have a watch party.**
- **Analyze your results and archive them.**

APPENDIX

Campaign Opposition

In 2023, my library was in the process of planning a new building project to replace an existing location. We realized that our levy that passed in 2019 with a 20-year sunset would not be able to fund the bonds needed for this project before it expired in 2039. It was suggested by our architect firm that maybe this was an opportunity to go back to the voters and eliminate the sunset, allowing extended financing terms and setting the levy at a permanent amount.



Our total levy at that time was \$0.31 cents, \$0.15 of which was on the sunset. I made a proposal to the board and they agreed (reluctantly) to put it on the ballot to remove the sunset levy and reset our total levy at \$0.28 cents. We created a campaign on

“right-sizing” our tax with the theme “Rolling Forward, Lower Tax, Brighter Future.” We decided to keep it low key, as it was on the same ballot as a school bond levy and school board elections. We hired a marketing firm to design the yard signs, do two mailers, and post some social media.

Two weeks before election day, we were hit with an opposition campaign. We had no clue this was coming until a library user watching morning television emailed one of our staff and said they had just seen a commercial against our ballot issue. Essentially, it said something like say no to a forever tax and tell the library to better manage their funds. Since we did not connect the new building plans to this ballot issue, it was not against our project, just against library funding with no sunset.

As a savvy user of the MEC web site, I popped over to see if I could find out who was behind this campaign. Unfortunately, there are still loopholes where not everything is publicly disclosed. It turned out that the opposition was from an LLC that did not register as a committee. It was also not registered as a business in the state of Missouri. Their address was a mail drop at a Staples store near Kansas City. They were also running ads against the school bond issue.

There ended up being two different television commercials, direct text messaging, and an opposition postcard sent to voters against our ballot

issue. I could never discover the source of their funding but they did eventually file a Non-Committee Expenditure Report with the MEC that disclosed that they spent over \$56,000 against our levy vote, and an additional \$50,000 against the school bond issue.

I addressed this opposition with an email blast to all cardholders, a letter to the editor of the newspaper, and a social media post. Although our levy situation was unique with two operating levy amounts and part of it on a sunset, it is important for you to stand up and address any opposition and not assume that people will see through the lies. They want to see the library stand up for itself. Here is the text of what I wrote:

Letter to the Editor

Rolling Hills Consolidated Library has a ballot issue on the April 2nd election, and we want all voters in our district to be informed voters. We currently have \$.16 cents on our permanent operating levy and \$.15 cents on a sunset operating levy for a total of \$.31 cents. Our library would like to LOWER the total levy by removing the portion with a sunset and increasing the permanent levy by \$.12 cents to \$.28 cents, which is 10% LESS than the current total levy. This “right-sizing” of our levy would allow us to finance our new building project over a longer period and get better borrowing terms, and also make commitments for staff salaries and benefits that would last beyond the end of the current sunset in 2039.

We are accountable to the elected County Commissioners who appoint our library board of trustees. We have managed our funds so well over the past 10 years that we

were able to pay off a loan early, saving tens of thousands in interest charges, and at the same time save enough in reserve to pay for half of the new building project. Do not let postcards and television commercials from an out-of-town, anonymous group convince you that our library is doing anything outside of the best interests of the communities we serve.

Our library receives high reviews and constant praise from our users about our excellent customer service, interesting programs, and comprehensive collections. Every day, we look for ways we can help make the lives of our users better and promote literacy and learning for all ages. We cover all areas of our district with two branches and a bookmobile, and we do outreach to all of the public and private schools who want services in our region.

For more information, visit our levy page at <https://rhcl.org/levy-info>. PLEASE VOTE on April 2, 2024.

Michelle R. Mears

Library Director, Rolling Hills Consolidated Library

This levy passed with 62% voting “Yes” which is less than the 80% we passed with at the previous election in 2019 but still a very strong result. Remember to get your precinct by precinct results and analyze them for where your library support is strongest and weakest. If you have not done a levy issue in a while, ask to see the last school levy election results. In general, people who support education tend to support libraries though it is not always in tandem.

Have faith, keep working, and don't give up!

~ Michelle

List of Resources

Sweeney, Patrick "PC", and John Chrastka. *Winning Elections and Influencing Politicians for Library Funding*. Neal-Schuman, an Imprint of the American Library Association, 2017.

Chrastka, John, and Patrick "PC" Sweeney. *Before the Ballot: Building Political Support for Library Funding*. ALA, Neal-Schuman, 2019.

EveryLibrary, <https://www.everylibrary.org/>

American Community Survey,
<https://www.census.gov/programs-surveys/acs>

Missouri Ethics Commission, <https://mec.mo.gov/>

Missouri Secretary of State,
<https://www.sos.mo.gov/>

Missouri State Library,
<https://www.sos.mo.gov/library/>

Community demographic resources.

Your own archives for library history and previous levy campaigns.