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Campaigning for a Library Funding Referendum: A Detailed Success Story

By Michael Celec and Jeannine Delwiche

Disclaimer: The processes we describe in this article are specific to the Commonwealth of Pennsylvania, and will be applicable to differing extents in other locations. As we are not attorneys, this document should not be relied on as a legal guide. We advise you to seek legal counsel regarding all legal matters. The processes we describe were current as of 2019.

This account is a companion piece to, “Funding Your Library By Ballot: Preparing to Conduct a Referendum.” That article dealt with decisions at the early stages of decision making about doing a referendum campaign. For libraries considering a funding referendum, we suggest they be read together.

Gathering Petition Signatures

The petition phase is an important step in your campaign. It is all about getting your referendum question on the ballot. Details on petition and other referendum rules are published by the Department of Community and Economic Development (DCED), currently at <https://dced.pa.gov/>. Consult the Referendum Handbook at that site for more details. You can also reach this office by phone with questions.

In our companion article, we noted that there is a way to get your question printed on the ballot without doing a petition. We explained why we recommend the petition option. Interested readers can refer to our companion article for details on the alternative path.

How many signatures do you need? During the petition phase, you and your volunteers need to gather a number of signatures, “equal to at least three percent of the number of persons voting at the last preceding general or municipal election” (*Referendum Handbook*). In order to find out your signature minimum, you can learn number of voters in previous elections by consulting your county’s voter services office. In our county, these numbers were available on the Voter Services website at: <https://www.montcopa.org/753/Voter-Services>.

It is recommended that you gather signatures in excess of the minimum needed, in case some are successfully challenged for noncompliance. For example, signatures with incomplete or illegible information, or signatures from ineligible people, may be removed from your count.

When you have collected enough valid signatures in support of adding your question to the ballot, you submit the signatures to your county’s voter services office. Your voter services office will add the question to the ballot if you have completed this step successfully.

Who can sign? There are rules about collecting signatures when you petition to have question placed upon a ballot. These rules codify not only what each page of the petition must contain and who can sign it, but also what information each signatory must provide, when they can sign it, and who can collect the signatures.

Petition time window. In Pennsylvania, signatures must be collected between the thirteenth and tenth Tuesdays before the election.

What it has to say. The petition must identify the referendum at issue and usually have introductory material at the top and spaces for signatures at the bottom. While the full text of the question being submitted is not technically required, we strongly advise it be included to establish that the signers were completely aware of the issue they signed up to support and thus eliminate a potential legal challenge. The statutory authority (e.g., the county board of elections) for the referendum should be cited. We were advised to include the full text of our question and followed this advice.

Each signer must be a registered voter of the political district *on the date when they sign*, and must provide both their occupation and address. (*Referendum Handbook 2019*).

While the petition may consist of more than one sheet, they must be bound together when submitted with the pages numbered consecutively. Every sheet of a petition must include:

- The circulator's affidavit (which must include a statement that the circulator is a registered voter of the political district)
- The circulator's address
- A statement that the signers signed with full knowledge of the petition's contents, their residences are correctly stated, they reside in the county, they signed on the date set opposite their names, and that, to the best of the circulator's knowledge and belief, the signers are registered voters of the political district.
- The circulator's notarized signature on this statement

While the person circulating the petition does not have to be the signer of the affidavit, the signer must have personal knowledge of the facts being sworn to in the petition (*Referendum Handbook, 2019*). This means that the circulators of the petition who are signing the affidavit must be registered voters in the same municipality. Figure 1 shows the petition form we used to gather signatures. Figure 2 shows the back side (second page).

Figure A: Petition page 1

Ballot Question Petition

Signatures must be procured within the legal period for securing same: and this Petition must be filed in the office of the County Board of Elections on or before the last day prescribed by law.

COMMONWEALTH OF PENNSYLVANIA

PETITION

To have the Library Company of Hatborough Referendum printed upon the official ballots for Hatboro for the May 2019 Primary Election.

We the undersigned, all of whom are qualified electors of the Borough of Hatboro, hereby petition the Montgomery County Board of Elections to have the following question printed on the official ballots.

QUESTION:

Shall the Borough of Hatboro establish a Special Library Tax to provide for the maintenance of and aid to Union Library Company of Hatborough at the rate of .55 mills on the dollar on all taxable real estate within the Borough of Hatboro?

PLAIN ENGLISH STATEMENT:

The Union Library Company of Hatborough, the public library at 243 South York Road, has been operating in Hatboro since 1755. A majority vote yes to this question would establish for the first time, a tax line item that is to be paid specifically to the library for its operations and maintenance. The rate on the ballot is for the library to receive .55 mills.

SIGNATURE OF ELECTOR	PRINTED NAME OF ELECTOR	PLACE OF RESIDENCE			OCCUPATION	DATE OF SIGNING
		HOUSE NO	STREET OR ROAD	CITY, BOROUGH, or TOWNSHIP		
1						
2						
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						

Figure B: Petition page 2

SIGNATURE OF ELECTOR	PRINTED NAME OF ELECTOR	PLACE OF RESIDENCE			OCCUPATION	DATE OF SIGNING
		HOUSE NO	STREET OR ROAD	CITY, BOROUGH, or TOWNSHIP		
15						
16						
17						
18						
19						
20						
21						
22						
23						
24						
25						
26						
27						
28						
29						
30						

AFFIDAVIT OF CIRCULATOR

COMMONWEALTH OF PENNSYLVANIA }
 COUNTY OF MONTGOMERY } SS:

Before me, the undersigned authority in and for said State and County, personally appeared the undersigned, who, being duly sworn according to law, did depose and say that his or her residence is as set forth below: that the signers to the foregoing petition signed the same with full knowledge of the contents thereof: that their respective residences are correctly stated therein: that they all reside in the said political district: that each signed on the date set opposite his or her name: and that, to the best of deponent's knowledge and belief, the signees are qualified, registered, and enrolled electors of the aforesaid political district.

This _____ day of _____, 2019

 (SIGNATURE OF CIRCULATOR)

 (PRINTED NAME OF CIRCULATOR)

 (STREET ADDRESS) (POST OFFICE)

My Commission expires: _____

 (CITY, BOROUGH, TOWNSHIP)

Your Messaging

You want people to vote yes. So, we recommend plastering the word ‘Yes’ on everything: your committee name, website and URL, any mailings, your email address, and so on. When you make calls or knock on doors, introduce yourself as representing the Yes Committee.

People have a good feeling about public libraries, but when you are asking people to raise their own taxes, you have to make the case as to why. You cannot rely on vague positive sentiment towards libraries. Campaigners must be prepared to answer questions in detail. They should memorize the FAQ and have figures ready to go.

Petition conversations.

Naysayers. If you speak to someone that declines to sign, or that balks in some way, it is probably not worth your time to try to argue and convince them to change their mind. Mostly when we had a negative reaction, it was someone that did not like the idea of a tax increase. It is not a good use of your energy and time to try to move them on this point. Thank them for their time and move on.

Eligibility. This was our biggest petition challenge. We encountered many people that would have loved to sign in support, but who did not live in the borough proper and thus were not eligible. For these people, we had a flyer directing them to our website for more information. People like these should be invited to volunteer, donate, or supply a story that describes their personal connection to the library. The pool of people that can vote is the same group that is eligible to sign your petition. In other words, only people who will pay the tax if the referendum passes are eligible to sign the petition. Someone that loves you from the next town cannot sign your petition. Thank them for their support and tell them what they *can* do for you, but do not let them sign the petition. Upon submission, the petition signatures are spot-checked and if too many signatures are ruled invalid, it can place your entire effort in jeopardy.

Software and Messaging Platforms

Selecting Software. A Voter Database Management Software (VDMS) tool is needed to ensure you have an accurate understanding of where your voters stand, and to help focus your efforts where they will have the biggest impact. The VDMS is used to 1) identify high frequency voters, 2) track the contact your volunteers have with voters, 3) identify your supporters and opponents, and 4) divide tasks among volunteers for canvassing (door to door conversations with eligible voters) and phone banking (volunteer calls to eligible voters). As the campaign matures, the VDMS is the simplest way to track your progress on reaching your campaign’s vote goal.

While both the Democratic and Republican parties use a VDMS, they use proprietary software you cannot access. At the time of this article, there are four non-partisan VDMS options available to you. Our campaign opted to use NationBuilder, following the recommendation of EveryLibrary. This option worked well for us. One advantage of going with NationBuilder is they have a useful voter database and web platform for building your website, in addition to the VDMS software.

Website and Facebook. Some campaigns forego a website due to the ubiquity of Facebook. We learned that some of our most frequent voters did not use Facebook, most often due to either a lack of interest in social media or privacy concerns. We recommend establishing a campaign website in order to reach those voters. An additional difficulty with using Facebook in place of a website is that neither Facebook group pages nor Facebook business pages are flexible enough to meet the needs of most campaigns. While you should set up a Facebook campaign page, such a page should be used mainly as a tool to drive people to your website (more detail below), not used as a replacement for it. Your cornerstone campaign information will live on your website.

It is highly recommended that your campaign website includes the following pages/sections:

- **About.** This section should include the precise wording of the ballot question, a brief account of why you are asking for funding, clarification on who can vote, the timing of when to vote, names of the campaign officers and roles (which minimally consist of a president and a treasurer), and contact information (at the very minimum an email address) for questions.
- **News.** This section should receive frequent updates throughout your campaign. Ideally, your social media director should develop enough content to ensure a new post will be added every day, at least during the month before election day. The distribution of new content at a regular interval is a good way to maintain interest, and to keep the campaign on your supporters' minds. We recommend using all of the following types of post:
 - **Stories.** Have your supporters write about the individual connection they share with your library. Use these to engage voters on an emotional level. Talk about memories: why *this specific library* is important to them. General statements about literacy or libraries are less useful. Keep it local and personal.
 - **Blog style essays.** Heavy on information about the library and the impact of the referendum, these should be written in collaboration with the library's director. These allow you to respond to issues raised by detractors on social media. These posts should not refer directly to any negative posts or comments. Use them to supply a fact-based message that is relevant to the counter-arguments to which your proponents can point. People that planned to vote no gave us good ideas for blog posts when they wrote negative comments about the campaign in the local FaceBook group.
 - **Third party content.** Find memes, insightful quotes, videos, news articles, and more that match your campaign's message. Find ways to illustrate your point of view. EveryLibrary shares a large amount of content from which your campaign can draw serious and factual content, while the Grumbly Librarian on Facebook offers a variety of posts that are often on the "lighter" side. You can also create memes to support quotes that you feel are particularly apt for your community.
- **Endorsements.** The endorsement page should consist of letters of support from your local leaders. Define 'local leaders' broadly. We had a letter from our local garden club, for example. Ask your Chamber of Commerce, scout leaders, teachers, and more. Ask the people in town that are known and respected. To enhance the authenticity of the endorsements we received, we asked our local leaders to place their endorsements on

either their personal letterhead or on the letterhead of their organization and to supply us with a signed copy of their endorsements. We also asked them to include a photo of themselves, to improve the “post-ability” of the endorsement, to increase the impact of familiar faces, and to enhance the relatability of their messages. Building your endorsements and making them look good is a task that is worth the extra time it takes. We return to endorsements in detail below.

- **FAQ.** This is where you put all your detailed thoughts and arguments. It is recommended that you write enough to satisfy *everyone’s* questions, from the most informed to the least informed. Anticipate objections and answer them ahead of time. Consider what someone would ask if they have never visited the library. Every library will have unique answers. Our FAQ filled two webpages and included answers to all of these questions:
 - Why does the library need this referendum?
 - Why is the library underfunded?
 - What will the library do that it can’t do now?
 - “Why do we need a library when we have the Internet?”
 - If I don’t use the library, why should a portion of my property taxes support it?
 - How much will it cost? Is it worth the cost?
 - How did the referendum get on the ballot?
 - What happens if the referendum doesn’t pass?
 - How does the local government support for us compare to that of neighboring libraries?
 - Why don't we fund the library in some other way? Since it’s eligible for grants, why doesn’t the library fund its operations mainly through grants?
 - Can’t the library just be run by volunteers?
- **Pledge.** This section is a place where registered voters can come, commit to voting Yes, and tell you who they are. We will return to why this is useful.
- **Donate.** Even if your webpage seems unlikely to bring in much money (ours did not), we recommend having the option to donate to your effort. It gives non-residents a way to contribute, and can be especially important if strong opposition arises against your campaign.

Ideally, social media campaigns put out new items on a regular and predictable basis. Our campaign aimed to offer seven different types of items, each on a weekly basis as depicted in Table A.

Table A: Social Media Posting Schedule (Items in bold were boosted through paid promotion)

Monday	#MyStory – a post from a patron or supporter (non-residents allowed)
Tuesday	FAQ Ad – targeted ad that promotes the recent blog post
Wednesday	Endorsement – letter from a local leader that supports voting YES on the referendum
Thursday	Other – Third party perspective that supports your message (news article or general facts)
Friday	Good Stuff Ad – a target ad that elaborates on a benefit patrons will receive if the referendum passes
Saturday	Good Stuff Poll – this poll is meant to engage residents and identify people that will vote yes
Sunday	Voter ID Ad – this targeted ad promotes voter registration, reminder of election date, etc.,

We kept the weekends ‘lighter’ and rolled out more informative posts on Tuesdays. Our campaign website is archived and can be used as a template for your campaign: <https://web.archive.org/web/20190520064208/https://www.yeshatborolibrary.org/> Any public library running a referendum campaign is encouraged to borrow, modify, and use any text they find useful.

Managing conversations (including opposition)

Imperfectly regulated platforms like Facebook can be used to disseminate false information. Outside of groups and posts where you can regulate comments and other activity, social media arguments tend to become emotionally draining.

Giving our limited resources, we adopted a careful Facebook strategy. We made a single announcement of the referendum on the local community Facebook group (and disabled the comments). On our campaign Facebook page, we set our filters to exclude profanity and certain key words, such as ‘tax.’ We used the ‘hide’ option on negative comments, which makes the poster’s comment visible to only the original poster and his or her friends while rendering it otherwise invisible. Opponents were free to organize and disseminate their own message using the same online platforms we did, though they chose not to do that. It was not our obligation to let the Yes Committee’s platform be co-opted by negative messages. Keep in mind this platform was developed by the Yes Committee, our incorporated political campaign, rather than the library.

In the first week of our public campaign, we did respond to negative comments in Facebook. Our responses used the following format:

“We’re glad you asked about that important issue. As noted on our website, the answer is (x). Here is a link to our website FAQ with more detail on this and many other questions.”

Note that this could be the answer to any comment, whether the comment was informed or ignorant, friendly or hostile. In retrospect, this was probably not a good use of our time and energy since it is nearly impossible to win an argument on Facebook. Additionally, the more comments a Facebook thread gets, the more visible it is. So, the best way to prevent a negative thread from gaining traction in a local group is to ignore it and to encourage your volunteers to do the same.

After the first week, we refrained from responding to negative comments in the local Facebook group. Instead, we monitored those comments and answered them as part of our next blog post. In our blog posts, we would work with the library director to lay out the counter-arguments to the latest negative comments. We would then promote the blog post using Facebook ads, targeted to local voters in our database. These blog posts never specifically referred to the negative comments, but did provide our answer to most objections. The goal was not converting the naysayers, but addressing their objections seriously for the undecided voters. If our ads received negative comments, we hid these as well.

Once you start talking to voters, your primary goal is to identify how they plan to vote and record this information in your database. As the election date nears, you should send reminder postcards to your identified yes voters only. With those who plan to vote no, simply cross them off your contact list so you do not inadvertently remind them to vote. People that give you a solid no are helpful because you know not to spend more time on them. It is usually not worth your while to get into arguments. With undecided voters, you can answer questions they may have to aid in their decision making. These undecided voters are the only conversations that should take up much time.

Regardless of where you hear negative comments, try not to let it get to you or to take it personally. Typically they are not haters of the library or its employees. Generally, opponents are speaking out because they are unhappy at the prospect of having their taxes raised. While you try to direct voters into recognizing the value of the library to your community, remember that there is no such thing as a tax increase that will enjoy universal support. Try not to let the negativity bother you. We admit we did not always succeed in this goal and thank EveryLibrary for supporting us during these times.

When people send questions via email that come from a skeptical place, it is probably not a good idea to ignore them, especially when you can see some care went into their inquiry. Even when people seemed to hate the idea of creating a special tax, we answered as best we could, often pointing to the responses already on our campaign website. Ignoring questions completely will tend to make people angry. If you take care to answer a negative inquiry straightforwardly, the person may not support you but at least they will not feel disrespected. However, some opponents will never be swayed, no matter how reasoned your argument. What you can do is work around them.

Acquiring Endorsement letters and Testimonials

Do not underestimate the value of securing endorsements and testimonials. Voters do not make their decisions based purely upon the facts, making educated decisions in a vacuum. They also consider what their friends and neighbors are saying and how those individuals feel about the referendum. If you can show that a beloved local organization or a local leader values the library, you can effectively borrow some of their political capital which for some voters may carry much more weight in the decision-making processes than your message alone. These community allies will be seen as have a more disinterested view when endorsing the referendum than library and the Yes committee personnel. By coordinating with community allies, you can amplify your message to reach more voters, and give your messages more resonance with the people they reach.

For both endorsements and testimonials, we found that our pro-library people tended to write things like, 'Libraries are important for literacy' or 'Reading is important.' While true, these sentiments are too abstract to serve as effective messaging for gaining support. For endorsements, you ideally want the leader or organization to explain why they value *this* specific library, what they do or have done to support it, and how the library aligns with their values and/or mission. In our case, the local elementary school principal spoke to how the library

fit with their mission to turn students into lifelong learners by giving them a place where the students could explore topics of interest on their own, including local history. A local historical society spoke to the importance of preserving local landmarks like our historic library. Some borough council members spoke to how our library increased local property value, how it served as the heart of our community, and about our library's ability to help bridge the gaps for those of lower socioeconomic status. A scout leader spoke to the years he and his troop had volunteered at the library's book sale, while a local gardening group explained why they donated their time to tending to the children's garden. These specific, personal reasons will have far more resonance with the voters than generic positive messages on the value of reading.

Similarly, with testimonials, you want to encourage supporters to talk about their emotional ties to your library. Ideally, testimonials will say something like, "I remember how exciting it was when my parents brought me to this library, how special that time was I shared with them, and I want my grandkids to have the same experience." Or perhaps, "One of the things that drew me to relocating to this community was this library. I was drawn to it immediately." Or even, "When my children were young, I contributed to the fundraiser and I still get a thrill of seeing their handprints hanging on the wall of the children's room." Testimonials should sound personal and committed. You are already covering the facts and figures – the testimonials are intended to invoke the "feeling" side of the equation.

Some people promised personal stories and endorsements and did not deliver them, so if you want these valuable items, you should have someone prepared to do a fair amount of follow up. Endorsements were particularly challenging because in order to maximize their impact, we asked for endorsements to be printed on letterhead and signed. For most endorsements and testimonials, we had to request the item two to three times before receiving it, and many took more prompts than that. If our experience is representative, for personal testimonials, you should expect a return rate between 20-45%. We also found that for many of these, it was beneficial to suggest revisions before publishing online. Be specific about what you want them to do. For your local elected officials, you will need to be diligent in securing written endorsements from all that promise to write one. These people are busy, which means their endorsements may be slow to arrive, and you may need to ask them more times than is comfortable. At the same time, you do not want to pester people with frequent, repeated requests so that they change their minds about endorsing you. We strove to make the process as easy as possible for the endorsers. Our strategy was to keep reducing the hurdles that were preventing the endorser from sending us the letter we wanted, and followed up at regular intervals to keep the request alive.

We had notable success in securing endorsements so feel it is worth elaborating on the process we used. We began by identifying the most obvious leaders and groups to approach, then tracked down their contact information (minimally their email and preferably also their phone number). We sent emails requesting their endorsement, providing a suggested draft endorsement and told them they could use, modify, or ignore it. It is important to note that we drafted a unique endorsement for every person we asked. While labor intensive, a series of letters that all said the same thing would have had far less impact than what we wanted. In drafting a letter for each person, we considered their profession, age, marital status, whether or not they had children (and

what their ages were if so), and anything we knew about them to predict how our library would resonate with them. Did they have young children that would like story time? Were they passionate about community safety? Were they keen on building community? A proponent for small businesses? An avid supporter of the arts? Did they have nonprofit experience or fiduciary responsibilities that would suggest they could speak to the fiscal responsibility of the library? We considered what we knew about each person, their skill set, their publicly-displayed values, and drafted a letter that had potential to highlight a unique aspect of our library.

Seeking these testimonials and endorsements does not stop with the initial requests. Despite our thoughtful, customized drafts, it was extremely rare for us to receive an endorsement without additional prodding. We waited a week between requests early in the campaign, and only 2-3 days in between inquiries near the end. We also did our best to remove barriers and to do as much work as we could for them. Some claimed they were ok with the letter but had not had the time to transfer it to a word document. Others said that they did not have a letterhead. To remove these barriers, we transferred the text into a word document for them, and even created organizational letterhead where none existed. If, after a few days, we still had not received a copy of the signed endorsement, we offered to print hard copy for them. We even arranged to bring hard copy to them at a meeting where they could sign it. If this sounds like a lot of effort, it was! But the payoff was tremendous: a large gallery of signed leader endorsements. If you adopt this approach, it is helpful to keep in mind that YOU are asking them to expend social capital in support of your cause. Your goal is to stay on their radar, remove any barriers you can, and graciously accept their answer if they decline your request. Expect to have to chase people down for endorsement letters. Plan to make your requests in rounds, starting with your highest value targets and moving down your priority list as you receive endorsements or declinations. Your goal is to be able to release at least one a week until the date of the election. Strive to collect a portfolio of endorsers that is diverse, not only politically but in other ways as well.

Photographs. Photos are helpful in maximizing your visual impact online, and help voters make a meaningful connection. The quality of the photos does matter, so you may have to chase down these from your endorsers as well. One strategy that worked well for speeding up the process was asking the endorsers if they would like to use an existing photo that we found on-line. We placed all the testimonials in the newsfeed of our website as can be seen here:

<https://web.archive.org/web/20190520170623/https://www.yeshatborolibrary.org/news>, while the endorsements were placed in a separate place as can be seen here:

<https://web.archive.org/web/20190520162310/https://www.yeshatborolibrary.org/endorsements>.

On Facebook, we posted them as .jpg files in a dedicated album:

<https://www.facebook.com/media/set/?vanity=YesHatboroLibrary&set=a.624894577938343>.

We believe these items were well worth the effort it took to secure them.

Conclusion

We hope we have indicated both how much work this campaign was, and how worthwhile the victory was in the end. While a funding referendum requires a great effort, the resulting dedicated library funding is as secure as any funding can be. The path is available for public

libraries to be funded in this way, and a library that is filling its role well in the community will tend to find support at the ballot box.