

SECTION 9. ADVOCACY

One of the most important responsibilities for FOL chapters is to educate the community and elected officials about the Montgomery County Public Library system. At the chapter level, FOL can advocate or lobby for its community library and the system **all year** and not just during the County budget season. Library support doesn't have to require organized meetings, preparation, or speeches. A chapter's board and members should always be prepared with a one-minute description of the library's needs. For a list of everyday advocacy tips see Appendix 9-A, "Ten General Things YOU Can Do to Advocate." Chapters should consider distributing this list to promote individual advocacy in their membership.

There are times when chapter members and leaders may have the opportunity to meet with elected officials and reporters or to conduct other public relations interviews. Please refer to Appendix 9-B, "Making the Case with Decision-Makers," for tips on handling and making the most of these situations. It is best to coordinate with FOLMC when contact has been initiated or received by the press. Keeping FOLMC informed eliminates confusion and communicates a cohesive message to the public.

Lobbying

The 3 Biggest Myths about Lobbying:

1. Lobbying is so complicated that it should be left only to professional lobbyists.
2. Grassroots, citizen-based lobbying efforts aren't effective.
3. Non-profit organizations like Friends groups aren't allowed to lobby. It is illegal.

For more details about lobbying, see Appendix 9-C, "Lobbying Information".

We're All in This Together!

The Montgomery County Public Library system is very fortunate to have Library Advisory Committees (LACs) and Friends of the Library chapters to advocate together. There is definite strength in numbers, as the successful advocacy efforts for FY 2012 and 2013 budgets proved.

In 2011, the MCLB and the LACs worked with FOLMC and the FOL chapters to bring the message of the patrons: "Libraries Matter. No More Cuts." The groups also decided on a library "color"—orange—that was used throughout the advocacy campaign. FOLMC made sure that the MCPL budget cycle and talking points were disseminated; a county-wide postcard campaign was shaped; and individuals were encouraged to write letters to newspaper editors, the County Executive, and the County Council. FOL chapters and LACs were encouraged to fashion their own advocacy efforts to "inspire their own constituents," and the messages were heard loud and clear. The planned budget cuts for FY2012 were drastically reduced.

In 2012, the theme adopted for the advocacy efforts of the MCLB, the LACs, FOLMC, and the FOL chapters was "Libraries Still Matter. Build Them Up." Again, talking points were

disseminated, and over 3,000 signatures on a unified petition—the same petition available for patrons to sign at all branches—was presented to the County Council. Budget increases were proposed and enacted for FY2013, and the County Executive and members of the County Council made reference to the extensive public campaign in support of the library system—demonstrating that advocacy works.

It is important to note that the success of these advocacy efforts were because of cohesive thoughts and actions. The arguments made by the MCLB, LACs, FOLMC, and FOL chapters to restore budget dollars were carefully thought out; and there was consultation with the library system managers throughout the process. The message was a single statement that did not “pit” one library against the other or one Montgomery County department against the library system.

Snapshot Day is another an example of advocacy at its best. “Snapshot Day: A Day in the Life of Libraries” was started in 2009 by the New Jersey Public Library system as a means of collecting data to share with state legislators. In 2010, the American Library Association voted to make it a national initiative. Now 35 states, including Maryland, use Snapshot Day as an advocacy tool to collect data to share with local and state legislators. Snapshot Day is an annual event held on the first Wednesday of October.

See Appendix 9-D, “Advocacy Resources” for online links and toolkits from the American Library Association and United for Libraries (formerly ALTAFF).

Ten General Things YOU Can Do to Advocate!

To help you in your efforts, please use this easy list of ten things you can do to campaign on behalf of the libraries you love.

1. **Talk, talk, talk!** Look around you. There are people everywhere who could use their local library, and who don't know about the valuable resources just waiting for them there. At the grocery store, the bank, the post office, on a walk with your dog – talk to people and tell them why you love your library. Help them see what they could learn there, and how they can help bolster support for this cornerstone of their community. It doesn't take much more than a friendly conversation for you to be a hero for your library!
2. **Keep informed.** ALA keeps up-to-date information on advocacy efforts on its website at <http://www.ala.org/advocacy> for advocacy at the national level. For Maryland library issues, refer to the Maryland Library Association <http://www.mdlib.org/> and the Citizens for Maryland Libraries <http://www.citizensformarylandlibraries.org/>.
3. **Talk to your representatives.** You've elected them; now tell them how they can help. Let them know you want them to support libraries, and give them specific ways they can get involved. You can schedule an appointment by calling your legislator's office, or even better, invite your representatives to visit the library for a special event you've planned. Let them see how their constituents are using the valuable services provided by the library, and you'll have gained an important ally. Please coordinate any meetings with the Friends of the Library, Montgomery County.
4. **Get press.** Speaking publicly about libraries – especially in a way that helps your community see the specific value in its local library – is a big way to get your message out to a lot of people at once. Are you good at public speaking? Call your local radio talk show or TV news show. Like to write? Write a letter to the editor or an op/ed piece for your local paper. However you get in touch with the local press, make sure you've developed your key messages and anticipated tough questions ahead of time, and are ready with statistics and information you can rattle off on the spot. Also, remember to inform FOLMC if contact has been initiated or received by the press.
5. **Work on your library's newsletter.** Many chapters have a regular newsletter for patrons. Volunteer to write an advocacy column for the newsletter, highlighting ways that patrons and advocates can help the library, whether that is through a letter-writing campaign, volunteering at events, calling their legislators, or other means. Collecting all the valuable information in one place helps interested parties pick and choose among the many ways to help.
6. **Make – and/or distribute – handouts.** Important information about the library, its services, and its needs can be disseminated in writing, for people to read later or pass on to others. If you have desktop publishing skills, or know someone who does, work to build written materials that can be passed along to others. These can include the library's hours and services, a "wish list" of things the library needs, information about an upcoming event, or any other information you need to get out there.

7. **Be your library's community ambassador.** Go out into your community and do public appearances to advocate for your library. Visit your local Lions, Elks, or Rotary Club, parent meetings at neighborhood schools, union meetings, and neighborhood watch groups – wherever people gather. Offer to speak about the things your library offers, and how many people are served there. Paint a picture of your community *without* this wonderful resource – and then enlist the help of these powerful groups in supporting the people and buildings behind it!
8. **Plan a great library event.** Get creative and create an event or promotion that will get lots of people involved. You can host the event at the library or at a local mall, county fair, or park, and invite the media to attend. You can hold a “Stump the Librarian” contest, invite patrons and others to read favorite children’s books for an all-day story time festival, or sponsor an essay competition about “Why I Love My Library.” Come up with an event idea that will target just the audience you most need to reach, and don’t forget to plan it for a convenient time for that group.
9. **Offer Internet tours.** Your library can be the window to the Internet for many people in your community. If you are web-savvy, offer to show people how to use it, and walk them through your library’s Internet policies. You can even invite local politicians and community leaders to a community-wide Internet orientation event, and show them how the library offers everyone equal access to technology.
10. **Build a network.** You are a powerful conduit for change on your own, but involving more people makes your message even stronger. Developing a network of library advocates in your community is a great way to add voices to the chorus of support. When you find people who are willing and able to help, keep track of their contact information and availability. Start a phone tree or an email list to keep in touch with everyone so that when an issue arises, you’ll know just who to contact to get the word out.

Making the Case with Decision Makers

Sometimes visiting an elected official can be a daunting process. Here are a few helpful hints for that meeting:

- Maintain an ongoing relationship.
- Invite them to library events and media opportunities.
- Use your contacts.
- Meet with newly elected officials and appointees as soon as possible.
- Make sure they know about your successes.
- Make it clear that you share their commitment to the issues.

Do's

- Do your homework and talk with staff.
- Be on time for your appointment with an official; even better, arrive early!
- Have a business card handy and present it at the beginning of the meeting.
- Use proper titles, even if you know the official personally.
- Prioritize what you want to say, in case your time with the official is limited.
- Provide a one-page briefing sheet with a clear statement of the action you are seeking and use the Friends of the Library, Montgomery County information.
- Remain calm and focused.
- Know your issues thoroughly and practice talking about them if necessary.
- Be prepared to make your case in any kind of situation – a hallway or the elevator.
- Tell your story – use specific examples from the official's neighborhood to make your case.
- Thank the official for taking time to meet with you.
- Follow-up with a thank you note mentioning the issues.
- Never miss an opportunity to meet and greet even at information community events.

Don'ts

- Don't be concerned if you don't know the answer to a question and say you will get back to them promptly with the requested information.
- Don't digress from the issues.
- If the official disagrees with you, don't take a confrontational position. Make your case as best you can and end the meeting on a positive note.

Bridge, Hook and Flag

These are the three techniques for controlling the conversation or interview so that you are sure to get the main point or points that you want remembered across to your audience.

Bridge. This technique will allow you to move from an area in the conversation that you don't want to discuss and get the conversation back to your message. If the reporter/elected official says, for example, "wouldn't it help the library if you began to charge user fees?" You can get the conversation back to your message by responding: "I think the real question is how important the library is to the wellbeing of this community? If we can agree that life-long learning is critical for individual success in the 21st century, then how can we afford *not* to fully fund them,

and certainly, funding the public library is an important governmental responsibility.” This may even be a good time to follow up with a fact to emphasize the *value* of the library. You could finish by saying, “In fact, did you know that even though nearly ___% of our citizens use the library on a regular basis, only ___% of the county’s operating budget is used for their funding?” The main thing is, you don’t have to come up with this off the top of your head – you should be prepared with this bridging statement prior to your interview. Remember **be prepared!**

Hook. This is a technique that gets the interviewer/elected official to follow-up on your first point allowing you to get a second point in. For example, you can say, “There are two very important considerations that must be taken into account before we support this proposed policy. The first is” then expand on that point. The interview/meeting will seem incomplete when aired or repeated if you didn’t follow-up with the second point. That is a good way to ensure that both your points get heard.

Flag. This technique is the easiest and most people use it unconsciously all the time. Flagging alerts your listeners to what you consider most important. It’s a good way to emphasize the key point or points you want the audience to remember. Flagging is simply giving your audience a verbal clue about what is important: “The most important thing to remember is ...” or “If you remember nothing else, please remember these two points ...”

Thanks to Sally Reed, Executive Director of ALTAFF (Association of Library Trustees, Advocates, Friends and Foundations).

Lobbying Information

In general, no organization may qualify for section 501(c)(3) status if a substantial part of its activities is attempting to influence legislation (commonly known as lobbying). A 501(c)(3) organization may engage in some lobbying, but too much lobbying activity risks loss of tax-exempt status.

Legislation includes action by Congress, any state legislature, any local council, or similar governing body, with respect to acts, bills, resolutions, or similar items (such as legislative confirmation of appointive office), or by the public in referendum, ballot initiative, constitutional amendment, or similar procedure. It does not include actions by executive, judicial, or administrative bodies.

An organization will be regarded as attempting to influence legislation if it contacts, or urges the public to contact, members or employees of a legislative body for the purpose of proposing, supporting, or opposing legislation, or if the organization advocates the adoption or rejection of legislation.

Organizations may, however, involve themselves in issues of public policy without the activity being considered as lobbying. For example, organizations may conduct educational meetings, prepare and distribute educational materials, or otherwise consider public policy issues in an educational manner without jeopardizing their tax-exempt status.

Measuring Lobbying

Substantial Part Test

Whether an organization's attempts to influence legislation, i.e., lobbying, constitute a substantial part of its overall activities is determined on the basis of all the pertinent facts and circumstances in each case. The IRS considers a variety of factors, including the time devoted (by both compensated and volunteer workers) and the expenditures devoted by the organization to the activity, when determining whether the lobbying activity is substantial.

Under the substantial part test, an organization that conducts excessive lobbying in any taxable year may lose its tax-exempt status, resulting in all of its income being subject to tax. In addition, section 501(c)(3) organizations that lose their tax-exempt status due to excessive lobbying, other than churches and private foundations, are subject to an excise tax equal to five percent of their lobbying expenditures for the year in which they cease to qualify for exemption. Further, a tax equal to five percent of the lobbying expenditures for the year may be imposed against organization managers, jointly and severally, who agree to the making of such expenditures knowing that the expenditures would likely result in the loss of tax-exempt status.

Expenditure Test

Organizations other than [churches](#) and [private foundations](#) may elect the expenditure test under section 501(h) as an alternative method for measuring lobbying activity. Under the expenditure test, the extent of an organization's lobbying activity will not jeopardize its tax-exempt status, provided its expenditures, related to such activity, do not normally exceed an amount specified in

section 4911. This limit is generally based upon the size of the organization and may not exceed \$1,000,000, as indicated below.

If the amount of exempt purpose expenditures is: \leq \$500,000

Lobbying nontaxable amount is: 20% of the exempt purpose expenditures

Organizations electing to use the expenditure test must file [Form 5768](#), Election/Revocation of Election by an Eligible IRC Section 501(c)(3) Organization to Make Expenditures to Influence Legislation, at any time during the tax year for which it is to be effective. The election remains in effect for succeeding years unless it is revoked by the organization. Revocation of the election is effective beginning with the year following the year in which the revocation is filed.

Under the expenditure test, an organization that engages in excessive lobbying activity over a four-year period may lose its tax-exempt status, making all of its income for that period subject to tax. Should the organization exceed its lobbying expenditure dollar limit in a particular year, it must pay an excise tax equal to 25 percent of the excess.

Advocacy Resources

United for Libraries (previously ALTAFF): <http://www.ala.org/united/advocacy>

American Library Association: <http://www.ala.org/advocacy/advleg/advocacyuniversity>



Information, courses and tools to help library advocates make the case at the local level.

[Advocating in a Tough Economy Toolkit](#) The following resources and tools, including news clips, op-eds, and statistics to help library supporters make the case for libraries in these times.

[Add It Up: Libraries Make the Difference in Youth Development and Education](#)

Research and statistics to help advocates make the case for libraries at every stage of youth development and education.

[Budget in the Crosshairs? Navigating a Challenging Budget Year](#)

This guide will help you prepare and plan for your library's survival and growth during tough economic times.

[Coalition Building](#)

Best practices of successful library coalition building from around the country.

[Cultivating Your Local Notables](#)

What's in a face? A toolkit for cultivating your communities local notables and celebrities for library advocacy.

[Frontline Advocacy](#)

An Initiative of ALA President Camila Aire, this toolkit is designed to motivate, encourage, provide content, train, and educate librarians and library workers at the front lines in advocating for their libraries and their profession.

[Frontline Fundraising](#)

Library fundraising takes place every day and at all levels of complexity. This *Frontline Fundraising Toolkit* covers the basics of annual funds, memorials and tributes, online giving and planned giving so you can design a fundraising effort that is perfectly suited to your library, your community and the resources of each

Library Snapshot Day Primer

Learn to organize a successful Library Snapshot Day in your state with this How-To created by the New Jersey State Library.

Making Budget Presentations

Tools, examples and perspectives to make presenting a library budget easier, and to help make your budget presentations more compelling.