

MESSAGE ► STRATEGY ► RESULTS  
**COMMUNICATION  
SERVICES** —► SINCE 1984

# The Best Defense Is A Good Offense: Crafting a Successful Campaign for Library Support

BRANDING  
STRATEGIC  
COMMUNICATIONS  
MARKETING  
GRAPHIC DESIGN  
and WEB DESIGN



**Library Campaign**  
TRAINING INSTITUTE



MESSAGE : WHAT YOU SAY > STRATEGY : HOW YOU SAY IT > RESULTS : THEY SPEAK FOR THEMSELVES!

# What Today is All About

- Making the connection between your library's on-going **branding, marketing and PR campaigns** and **vote/advocacy campaigns**
- Taking the long view
  - How can we make it all work together
- Planning for the short term
  - What do we need to accomplish today, next month . . .
- Bringing it all together
  - How can we be successful

# The Long View

- Long-range decisions about a public vote
  - Recognize need to position library as an essential service at least 6 months before the vote
  - At least a year to have an impact
- Brand and Market to build
  - Recognition
  - Patron base and brand loyalty
  - Community support
  - Become a positive+ for elected officials so they want to be affiliated
- Segue into a voter initiative

# The Short Term

- Have a plan/timeline for branding/marketing campaign tactics and goals
- Educate board, staff and volunteers on messaging
- Actively engage in campaign—work to make library seen as an essential service in the community
- Keeping an ear to the ground for political backlash
- Organizing for long-term effort

# What Do We Mean By “Essential Service”



# Bringing it Together

- Integrating branding and voter/advocacy campaigns
- Making the connections
- Building community support and finding out who is against project
  - Understand their opposition, develop message and strategy to neutralize
- Be ready to move forward when ready



# Nuts & Bolts

- Branding
- Marketing
- PR
- Vote Yes/Advocacy Campaigns

# What is Branding and Marketing?

- A necessary evil for libraries?
- A comprehensive approach to conveying your library's message to your target audiences

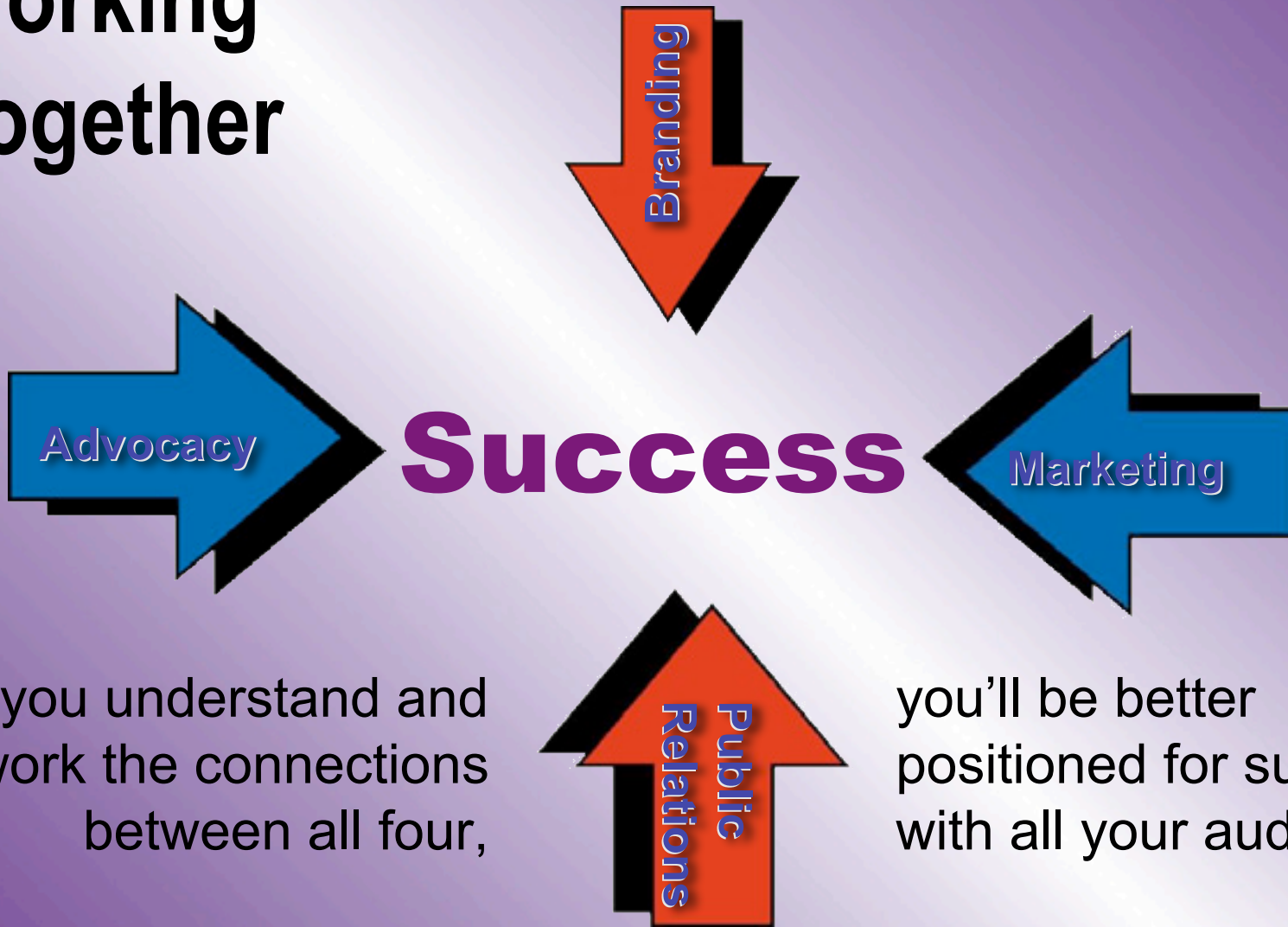
# What is Public Relations?

- Just sending out press releases?
- **A free way to convey your brand and message.**

# What is Advocacy?

- Ugh, politics.
- **A way for libraries to get what they need in an increasingly competitive political environment with multiple players vying for shrinking financial resources**

# Working Together



If you understand and work the connections between all four,

you'll be better positioned for success with all your audiences.

# Who Are Your Audiences?

- For branding, marketing and PR
  - Board and Staff
  - Patrons
  - Friends
  - Policy Makers
  - Opinion Leaders
  - Business Leaders
  - Elected Officials
  - Voters

# Who are Your Audiences?

- For Vote Yes/Advocacy
  - Board and Staff—live the brand, bring sense of purpose to advocacy
  - Patrons—use and support the library, become supportive voters, communicate with their elected officials
  - Friends—support the library, supportive voters, communicate with elected

# Who Are Your Audiences?

- For Vote Yes/Advocacy
  - Opinion Leaders—their support of the library impacts hearts and minds of others, supportive voters
  - Business Leaders—their support brings increased credibility to efforts, supportive voters
  - Elected Officials—combined advocacy efforts of other audiences impacts their actions
  - Voters—positioned to support library efforts

# What is Branding?

- Integral part of marketing
- Sets libraries apart from other public institutions
- Sum total of all attitudes, perceptions and beliefs about your library
- Emotional branding:
  - Love
  - Hate
  - Hope
  - Fear
- Libraries give people hope, a sense of community, a long life of learning

# What is Marketing?

- All activities geared to raising the identity and use of the library
- **Libraries need to market**
  - Reinforces position as an essential service for the community
  - Reinforces that libraries are very relevant and haven't been replaced by the internet
  - Positions library to garner community support for budget votes, building referendums, legislative action

# Marketing 101

- Define mission and programs
- Define audiences: children, adults, seniors, families, potential donors, opinion leaders, elected officials, etc.
- Examine strengths and weaknesses
- Define your message
- Establish graphic identification—logo—and graphic standards
- Develop campaigns to brand the library in the community as an essential service

# Examine your strengths & weaknesses: SWOT session

- INTERNAL
  - Strengths
  - Weaknesses
- EXPLORE
  - People
    - Staff
    - Board
    - Patrons
  - Programs and Services
- EXTERNAL
  - Opportunities
  - Threats
- EXPLORE
  - **Position** of the library in the community
  - What **values** the library stands for in the community
  - What's **important** to the community

# Establish logo and graphic standards

- One logo for library
- Vertical and Horizontal format, if necessary
- Consistent color palette
- Consistent typefaces
- Graphic standards: how it is used
  - Published guidelines

# Organizational identification

Jervis   
Public Library  
where *discovery* begins

*create possibilities*  
LaGrange  
LIBRARY 

Fairport  INSPIRING!  
Public Library

MESSAGE ▶ STRATEGY ▶ RESULTS  
COMMUNICATION  
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- > MESSAGE : WHAT YOU SAY
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# Organizational Identification



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# Marketing Tools

Use each opportunity to reinforce your message and the importance of the library—**tell your story and build relationships.**

- Print Materials
  - Newsletter
  - Direct Mail
  - Print advertising
  - Annual Report
  - Flyers
  - Posters
  - Brochures
- Online
  - Web Site
  - Social Marketing
    - Facebook/You Tube
  - E-mail newsletter
- Additional Ways to Market
  - Displays
  - PowerPoint presentation

# Marketing Tools

- Voice mail tip of the week
- Highly visible sign/banner outside building with website address
- Always promote website in everything you do
- Blogs
- Branded library vehicles
- T-shirts/buttons/hats



# Planning

- Putting the pieces together
- Understanding roles and responsibilities
- What needs to be done
- How everything will get done

# Campaign Planning Questions

- What are the issues facing the library?
- What are your goals? What do you want to have happen?
- How will you accomplish goals? What are the objectives?
- How do you want the library to be perceived? What is the library's position in the community?
- Who are your audiences? Who needs to hear your message?
- What is your message? What proof do you have to back up your message?
- What strategy/tools will you use to get your message to your audiences?
- How well did you do?

# Why It's Important To Plan

- Campaign plans give you a framework of what needs to be done and when
- Plans help to coordinate the various campaign functions so they work together like a well oiled machine

# Why It's Important to Plan

- Helps to make sure you're staying on target
- Develop goals, timelines, budgets, etc.
- Identifies what you need before its too late
- Ensures a consistent strategy and message throughout the entire campaign
- Understand what the library can do and what the campaign can do

# Library Vs. Vote Yes

- Library can pay to say “Vote”
- Library can not pay to say “Vote Yes”
- “Vote Yes” has to be paid for privately
  - Friends group can pay
  - Donors can pay
  - Library foundation can pay
  - Library can't

# What Is A Campaign Plan?

- Actual, physical written document that sets out the who, what, when, why and how of a campaign

Your  
Library's  
Referendum  
Campaign Plan  
Election Day

# What Is A Campaign Plan?

- Covers
  - Your strategy
  - Roles and responsibilities
  - Overview of political landscape, research, specific information on what vote is for
  - Determining who your key voters are (targeting)
  - What your message is going to be

# What Is A Campaign Plan?

- How you're going to manage information
- How you're going to reach voters (field)
- What you're going to mail to voters (literature)
- How you're going to handle the media
- How you're going to build grassroots support in the community
- When everything needs to be done by (campaign calendar)
- How you're going to pay for it all

# Why Bother?

- Determine Strategy
- A campaign is a long-term commitment of activities building momentum to a crescendo on day of the vote, not the day before and not the day after
- Have a plan in place when field operations starts 8-12 weeks before day of the vote
- Being organized early is a political show of force and will scare opponents away

# Why Bother?

- You'll know who is doing what
- All up front work will already be done
  - Research
  - Targeting
  - Message
- Ready to hit the road when “campaign season” starts
- Have a strategy in place

# Your Campaign Team

- Group of dedicated individuals who believe in your library and the goal(s) of the initiative
  - Campaign manager/coordinator
  - Fund Raising Coordinator
  - Direct Mail coordinator
  - Phone Bank Coordinator
  - Community Outreach Coordinator
  - Media Coordinator
  - IT Coordinator
  - Treasurer

# Your Campaign Team

- Campaign Manager/Coordinator
  - Chief Strategist
    - Writes the plan
  - Make sure everyone stays on message
  - Keeper of “to do lists” throughout campaign
  - Coordinator of all various activities
  - Maintains campaign calendar

# Your Campaign Team

- Fund Raising Coordinator (Could be your Friends group)
  - Raise money to pay for vote yes campaign
    - Events
    - Direct Mail
    - One to one asks

# Your Campaign Team

- Direct Mail Coordinator
  - Integrate the message into at least 4 pieces of literature
  - Develop look/branding of pieces (work with professional graphic designer)
  - Write the pieces
  - Arrange for printing and mailing

# Your Campaign Team

- Phone Bank Coordinator
  - Coordinate and organize phone banks
  - Find an office with at least 5 phones to use
  - Recruit volunteers to phone bank
  - Phone banking is a group effort, can't take the lists home and call
  - Can use cell phones

# Your Campaign Team

- Community Outreach Coordinator
  - Manage community relations
  - Build support among various constituencies and community groups
    - Find community champions for the library
    - Work with local Rod and Gun Clubs to support referendum and get the word out to their members
    - Speaking at community and civic groups, such as Rotary, Chamber, etc.

# Your Campaign Team

- Media Coordinator
  - Work with the press
  - Write releases, letters to the editor, arrange for editorial board meetings, schedule talk show appearances, etc.
  - Should be someone with some experience dealing with the press

# Your Campaign Team

- IT Coordinator
  - Computer Guru
    - Establishes voter database by merging voter files and patron files
    - Generates phone bank lists
    - Tracks voters from phone banks
  - Work with Direct Mail co-ordinator to develop e-mail blasts

# Your Campaign Team

- Treasurer
  - Develops budget
  - Keeper of the money
  - Pays bills
  - Makes sure you don't overspend

# Your Campaign Team

- Key players
  - Library director, staff, trustees and friends group
  - Need to decide what role they will play
- Library Director
  - Chief spokesperson?
  - Campaign Manager?
  - Strategist?

# Your Campaign Team

- Library Staff
  - Need to clearly delineate what they can and can not do on library time
  - Need to decide if they can volunteer
- Library Trustees: should all be involved
  - Trustee President could be spokesperson
  - Trustee members can take on various key roles based on talents, can be volunteers

# Your Campaign Team

- Friends Groups
  - Raise money
  - Take on key roles based on talent
  - Volunteers

# Research/Political Landscape

- Plan should include a detailed description of what the referendum is about
  - What the money will be used for
  - What percentage increase in taxes
  - Architectural plans, if relevant
  - Figure out the Public Service Return on Investment
- Political landscape
  - Who are your natural constituencies
  - Who are your natural opponents
    - How much juice do they have?

# Research/Political Landscape

- Political Landscape
  - What other elections are happening at the same time as your vote?
  - What are other issues that are percolating in the community that could impact your success
- Know your demographics
  - Go to your local library system for information
  - Analyze your patron file

# Research/Political Landscape

- Review your library's annual report data
  - Know amount of users
  - Where they are from
  - How many transactions

# Targeting or Who Are Your Voters

<p>Frequent Voters Low Library Use Type of voters: neutral or hostile to library</p>	<p>Frequent Voters High Library Use Type of voters: Supporters</p>
<p>Infrequent Voters Low Library Use Type of voters: Not targeted</p>	<p>Infrequent Voters High Library Use Type of voters: Supporters</p>

# Targeting or Who Are Your Voters

- Overlapping voter file with patron file
  - Find someone with extensive database (Access) experience
  - Merge/purge files
  - End up with a list of
    - Patrons who are registered voters
    - Registered voters in the household who are not patrons
    - Registered voters who live with non-registered patrons
  - Extremely powerful information

# Targeting or Who Are Your Voters

- Figure out how many votes you need to win
  - Look at past vote totals
  - Look at number of overall voters
  - Figure out how many yes voters you'll need to identify and then turn out to vote

# Targeting or Who Are Your Voters

- Saugerties Example
  - 12,153 registered voters
  - 7,959 card holders, take 20% out for underage card holders.
  - 6,367 card holders
  - Past turn out for library votes: 312 in 2007
  - Merged/purged patron and voter files
  - Try to identify and turn out at least 1,300 yes votes

# Targeting or Who Are Your Voters

- Libraries have the advantage
  - You know who your patrons are
  - Register unregistered patrons to vote
  - Target registered patrons with direct mail
  - Historically been low voter turn outs
  - Mobilize your base

# Developing Your Message

- Draw people in on an emotional level
  - Appeals to positive emotions of love and hope
    - What's in it for them
    - What's in it for their families, their children
- Spur voters to action
  - Provide them with a sense of ownership (yeah, it's my library!)
- Respect Taxpayers

# Developing Your Message

- In 1992, when James Carville ran Bill Clinton's first presidential campaign the following phrase was on the white board

# KISS

Keep It Simple Stupid

Don't over think.

Remember who your audience is.

# Developing Your Message

- Message Box

What we are saying about ourselves	What they are saying about themselves
What we are saying about them	What they are saying about us

# Message Box

- Message sample: Paul Wellstone's 2002 Senatorial Race

Wellstone on Wellstone: You can count on Paul to fight for you	Coleman on Coleman: He brings people together to get things done
Wellstone on Coleman: He won't be on your side when it counts	Coleman on Wellstone: He fights with everybody and doesn't get the job done

Wellstone's response: It's true, I don't get things done for big corporate interests and lobbyists, but they don't need my help. I'm on the side of the rest of Minnesotans.

# Message Box

<b>What Library Says About Itself</b>	<b>What the anti-tax people say about themselves</b>
Strong library= Prospering community	We know what the community needs
<ul style="list-style-type: none"><li>• Opportunity: open 6 days a week</li><li>• Freedom: X people borrowed X amount of books, cds, etc.</li></ul>	

# Message Box

Library on Anti-Tax	Anti-Tax on Library
Anti-library=anti-family, anti-children, anti-senior	Waste of taxpayer money
<ul style="list-style-type: none"><li>• library fosters community</li><li>• library provides great dividends on tax dollars</li><li>• library provides opportunity for all</li></ul>	<ul style="list-style-type: none"><li>• Why should I pay if I don't use it</li></ul>

Library's response: Community loves the library. Mother's bring their children here, it's a place for families, seniors use it. X items checked out, Y have cards.

# Developing Your Message

- Bold, clear, concise
- Articulate values that patrons and community members will relate to
- People identify with values
  - not always the same as their self-interest
- Leave people empowered to act—Supporting Your Library!

# Just Be Prepared

- Your plan should include “snappy answers to stupid questions” under your message
- Be able to respond to the political landscape issues by using your message and themes
- Don't be afraid—be assertive, don't shy away from answering negative anti-tax messaging.
  - If you don't stand up for the library, why should the voters?
- Track local blogs for negative chatter
- Don't underestimate impact of national issues

# IT—Information is Power!

- Plan should include how computers and computerized voter file will be used
  - Track voters based on phone banking, petition signers (414s)
  - Don't forget to automatically put your board, staff (if they live in town) and previous library supporters (friends) in your file as a 1
    - 1: Supportive
    - 2: Undecided
    - 3: Opposes

# IT—Information is Power!

- Use the file for phone banking call sheets
- Integrate file with word processing for easy mail merges
  - Thank you letters
  - Campaign updates to supporters
  - Direct mail fund raising
  - Direct mail of campaign literature

# Reaching Voters in the Field

- Once your targeting is done and you know where your potential voters are you want to reach them on a one-to-one basis
- Phone Banking
  - 1<sup>st</sup> Round: ID voters
  - 2<sup>nd</sup> Round: ID voters you didn't reach the first time
  - 3<sup>rd</sup> Round: Get Out the Vote Calls, Call only the 1s
- Scripts
  - Actually ask people how they're going to vote

# GOTV Phone Banking's #1 Rule

- It's your job to turn out the yes voters
- It's someone else's job to turn out the no voters
- Get Out the Vote calls only go to identified Yes voters—your 1s.

# Reaching Voters in the Mail

- Plan should include how many mailings
  - Four is a good number, this includes a GOTV Band Wagon Piece
- How much mailings will cost based on who you're mailing to
- Initial ideas on creative
  - Work with a professional graphic designer—either pay or get one to volunteer

# Reaching Voters in the Mail

- Friend to Friend Campaign
  - Develop network of supporters who will write notes to their friends asking them to support the library vote
  - Campaign provides postcards which supporters sign, post and mail
  - Can also use e-mail with embedded graphics

# Reaching Voters on the Web

- Plan should include details of website to be used
  - Should be branded to rest of campaign
  - Give people the information they need and want
    - More detailed
  - Give people the opportunity to sign on to “Taxpayer” petition and volunteer
  - [www.voteyesforourlibrary.org/lagrange](http://www.voteyesforourlibrary.org/lagrange)

# Paid Media

- Plan should include any
  - Paid newspaper, TV or radio advertising
  - Costs
  - Initial Creative

# Playing With the Press

- Who will be the chief spokesperson for the campaign?
- Who will be responsible for dealing with the press?
- Develop a press list.
- How many press releases?
- What types of press events?
- Editorial board meeting
- Op Ed, Letters to the Editor, Talk Shows

# Building Community Grassroots Support

- Garnering support from community groups is essential to campaign success
- Plan should outline
  - What groups
  - Who will reach out to them
  - How you will utilize them

# Building Community Grassroots Support

- Having other community leaders carry your message gives campaign added credibility
- Go beyond comfort zone—not just Rotary or Chamber but Sportsmen’s Groups, Recreational organizations, local PBAs and firehouses, etc.
- Ask them to reach out to their members, put info in their newsletters, Friend to Friend campaign

# Campaign Calendar

- Work backwards—from the day of the vote to when the campaign starts
- Track as much as possible and then continue to update
- Share it with all who need to see it
- Scheduling events is an important task

# Campaign Calendar: May

Saugerties Library Referendum						May 2008 (Eastern Time)	
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
27	28	29	30	1	2	3	
Phone Bank tracking		Bandwagon Piece to		Drop Bandwagon Pie... Full page ad in Week Letters to the Editor in 7pm - Cahill PTA (B...			
4	5	6	7	8	9	10	
GOTV		9:30am - Morse PTA...	Referendum Vote				
11	12	13	14	15	16	17	
18	19	20	21	22	23	24	
25	26	27	28	29	30	31	

# Campaign Calendar: April

Saugerties Library Referendum							Apr 2008 (Eastern Time)	
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday		
30	31	1	2	3	4	5		
	3pm - Monday Club ...		Phone Banking: Initial ID @ Need to find location	Letters to the Editor in				
6	7	8	9	10	11	12		
Phone Banking: Initial	Tracking of phone bank data				DM Piece #2 to printer			
	7:30am - Kiwanis pr...			Letters to the Editor in Referendum related ...				
				7pm - Historical Soc...				
13	14	15	16	17	18	19		
	DM piece #3 to printer	7pm - League of Wo...		DM piece #2 to mail ...	Direct Mail piece #2 ...			
	7pm - Lions Club @ ...			Letters to the Editor in Referendum related ...				
	7pm - Public Presen...			7pm - Women's Club				
				8pm - Blue Katz Pre...				
20	21	22	23	24	25	26		
	Voter ID Phone Banking @ to be determined				Phone Bank tracking			
	DM piece #3 to mail ...	Bandwagon piece to ...	Direct Mail piece #3 ...	Letters to the Editor in Referendum related ...				
27	28	29	30	1	2	3		
Phone Bank tracking				Drop Bandwagon Pie				
		Bandwagon Piece to ...		Full page ad in Week				
				Letters to the Editor in				
				7pm - Cahill PTA @ ...				

# Campaign Calendar: March

Saugerties Library Referendum							Mar 2008 (Eastern Time)	
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday		
24	25	26	27	28	29	30	1	2
				Public Ed Campaign				
2	3	4	5	6	7	8		
				Public Ed Campaign				
9	10	11	12	13	14	15		
				Public Ed Campaign	4pm - Referendum TF	Andrew Carnegie Day		
16	17	18	19	20	21	22		
	DM Piece #1 to printer 5pm - Referendum TF 6pm - Board Meeting	7pm - Meeting with ...		Public Ed Campaign	First legal notice an...			
23	24	25	26	27	28	29		
	DM piece #1 to mail			Direct Mail piece #1 Public Ed Campaign 7pm - Public Presen...				
30	31	1	2	3	4	5		
3pm - Monday Club ...			Phone Banking Initial ID @ Need to find location	Letters to the Editor in				

# Budget

- Yes, this all takes money
- Key to develop a budget that accounts for all paid activities and then add 20% for a fudge factor
  - Literature including fund raising materials
  - Postage
  - Paid Advertising
  - Personnel
  - Special Event costs
  - Headquarters cost, if you get one

# Fund Raising: How To Pay For It All

- Work with Friends group
- Ask, ask, ask
- Plan what types of fund raising activities you'll have
  - Direct Mail
  - Special Events
  - One on one asks

# Come back for Part II

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