

The View from *The Other Side of the Table*

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Obligatory Disclaimers

- My personal opinions and not the opinion of any Board or Committee
- I'm new to the role of Finance Committee member and still learning the process
- Your mileage may vary.
- Every personal and community dynamic is unique.
 - Adopt what you think will work for you and your situation.
 - Listen. Learn. Share. **Repeat.**

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The Role of the 'Other Side'

- Who appoints?
 - The Town Moderator (in Westborough) ...
 - ... Who reports directly to the voters
- Who are 'they'?
 - Full title: **Advisory Finance Committee**
 - 9 voters
 - Not elected or appointed (to other town office)
 - Not a town employee

My examples are all based on Westborough.
Get to know the charter and by-laws of your hometown!

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The Role of the 'Other Side' (p. 2)

- What do 'they' do?
 - Serve as advisors direct to the Town's Legislature
 - Town Meeting
 - Make recommendations on **all** articles that come before Town Meeting
 - ... deemed to be the "best for the interests of the Town and its citizens."
 - "shall consider all matters related to the appropriation, borrowing and expenditure of money by the Town, its indebtedness, methods of administration of its various departments, and other municipal affairs."

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The Role of the 'Other Side' (p. 3)

- How do 'they' do it?
 - Meetings, meetings, and more meetings.
 - "Free access to all books of record and accounts of any office or department of the Town."
- Needless to say, the task is daunting...
 - And – even if they want to help – it can be difficult.
 - Try to make their job as easy as possible
 - Can you help overcome obstacles?
 - Can your librarians get information that could turn 'them' into library users?

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Time and Attention of the 'Other Side'

- A dilemma:
 - Need and desire for detail
 - Lack of time to absorb/analyze the detail
- How much time and attention does the library get?
 - Can you develop an 'elevator speech' for your budget, service objectives?

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Time and Attention of the 'Other Side' (p. 2)

- Committee liaisons to departments
 - Allows one committee member:
 - More depth
 - More conversation
 - More give and take
 - More understanding (of each side)
 - An opportunity to nurture a champion
 - Or, at least, to practice your rationale

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Tell Your Own Story...

- Don't assume it's being told for you
- Who provides the 'budget packet' to the Finance Committee?
 - The Town Manager?
- What's in the 'budget packet'?
 - How is the library budget presented in it?

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Tell Your Own Story... (p. 2)

- Make the most of your 'face time'
 - Talk about changes in the budget
 - You'll get asked about them anyway
 - Local success stories
 - Expected outcomes
 - What's in it for the residents?
- And don't forget... Often, you're on TV
 - People do watch and remember what you say

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Tell Your Own Story... (p. 3)

- How can you best convey...
 - The value the community receives from your library?
 - The needs of the library (for maintenance, capital, etc.)?
- ... in the context of your town's current financial condition
 - Handouts (spreadsheets, narratives, etc.)
 - Field trips
 - Photos

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Who's Telling Your Story?

- **Making the pitch**
 - Trustees
 - Policy makers
 - Residents and taxpayers, too.
 - Library Director
 - Professional, Department Head
 - Employee
 - Patrons, customers
 - Perhaps best utilized before/at Town Meeting

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Telling Your Story

- **Take Responsibility**
- **Be prepared**
 - Every past success and failure is an opportunity
 - What has worked (or not worked) for others?
 - What convinced *you*?
 - Try to convince a friend
 - Practice, practice, practice!

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Telling Your Story (p. 2)

- **Minimize Surprises**
 - In local government, no one likes surprises
 - Especially in an open meeting with others watching
 - A letter, email, phone call can help
 - Bigger than expected changes
 - Unexpected maintenance, capital needs
 - Anything not obvious from the materials they have

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Telling Your Story (p. 3)

- **The Detail vs. The Big Picture**
 - As the proponent, you've got a big job, too!
 - Know the details
 - Cost, rationale, why do we need it now
 - Know the town's 'big picture'
 - Financial conditions, other pressing needs
 - Navigate between the two as necessary
 - Often, deciding while you're presenting

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Telling Your Story (p. 4)

- **Can you offer alternatives?**
 - Sources of funds
 - Raise and appropriate
 - Borrowing
 - Trust funds
 - Private fund raising
 - Getting what you need this year vs. waiting for another year (or 2 or 3)...

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Telling Your Story (p. 5)

- **Danger: Jargon Ahead**
 - On *both* sides
 - Strive for clarity
 - Circ desk? OPAC? Adult fiction?
 - Levy ceiling? Levy limit? Debt exclusion?
 - Try to set the example!

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Telling Your Story (p. 6)

- **Answer.**
 - Really. I mean it.
 - It's annoying to not get an answer to a direct question.
 - Many (most?) people assume you're hiding something if you don't answer directly.
 - Check in and see if you really answered the question. If necessary, try again.
- **Ask.**
 - It's a dialogue.
 - It's ok to ask your own questions.

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Follow Through

- After your initial presentation, there may be more work to be done...
 - If any questions or comments need more detail
 - If you think of something you should have said
 - Send a follow-up note
 - Maybe even offer to go back to the Committee

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Before – During – After

- Be polite
- Say ‘thank you’
 - For their time
 - For their attention
 - For their consideration

 - And, if all goes well, for their support

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Know Your Options...

- ... Especially if things don't go your way
- If you're facing an override
 - Learn about the override process.
 - Mass. Department of Revenue
Division of Local Services
 - Levy Limits: A Primer on Proposition 2 1/2
<http://www.mass.gov/Ador/docs/dls/publ/misc/levylimits.pdf>
 - Downloadable audio/video Proposition 2 1/2 course
http://www.mass.gov/Ador/docs/dls/tr/prop2_half.exe

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- **Show** that *you* care
- **Demonstrate** the benefit to the community
- **Convince** others why they should care, too.

Good luck!