

Four County Library System

School Ballot Referendum Toolkit for Public Libraries



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1. What is a School Ballot Referendum?

A school ballot referendum occurs when a library requests funding directly from school district voters through a resolution placed on the annual school district ballot. This mechanism is expressly provided for all types of public libraries in section 259 of Education Law (<https://www.nysenate.gov/legislation/laws/EDN/259>)

See the Benefits for Libraries section for more information. School district taxpayers pay an amount based on their assessed property value, just like they do for school taxes. Generally the annual cost is low because it is spread across many people, but the tax impact will depend on the amount that the library requests.

When one public library within a school district wishes to go on the school ballot, it is wise for any other libraries within that school district to join in the effort. All taxpayers within the school district will be responsible for paying the new library tax even if the library in their village or town did not participate. Getting all of the libraries on board creates a greater probability that the referendum will pass.

If one library wishes to go on the school ballot but one or more other libraries within the school district do not wish to, the library that does wish to is still entitled to do so. Their fight may be more difficult without the other libraries on board, but they do not need permission of, or participation by, other public libraries on the district. But, again, taxpayers that use a library who has chosen not to participate will still have to pay taxes to support the library that requested funds if the resolution passes.

2. Frequently Asked Questions

Q: If a library wants to be on the ballot to request tax money from the school district taxpayers, what is the process?

A: The library board should ask the school district's Board of Education to place a proposition on the school district ballot. The library board should draft the proposition, prepare a valid petition, and collect at least 25 signatures from school district residents. The Board of Education must honor the request and place the library's funding proposition on the ballot. The school cannot refuse to present the proposition and cannot edit or alter the wording.

Q: Are public and association libraries autonomous legal entities?

A: Yes. Though they usually have a budget and staff much smaller than the local school district, public and association libraries are corporate entities chartered by the Board of Regents and registered by the Commissioner of Education.

Q: Why do libraries request funding through the school district ballot?

A: The law provides a means for these libraries to access voters in the community in order to levy taxes and to use tax collection mechanisms. (Ed. Law §§256[1], 259[1], 255[1]). Libraries serve the entire community. Often, libraries chartered to serve a town or village are already serving school district residents from outside the library's chartered service area. Going to the voters spreads the cost of running the library across more of the people that use it. Going to the voters creates a stable funding stream for libraries being squeezed out of municipal budgets by the property tax cap.

Q: Does a successful school ballot vote mean that the library is now a school district library?

A: No. A successful vote sets up a stable funding stream for the library. It does not change the essential DNA of the library - that is set in the library's charter.

Q: Can a public or association library request that its budget vote be held at a separate time and/or separate location from the school district's budget vote?

A: Yes. At the discretion of the school district, a special district election may be held at a time and place designated by the school district. (Ed. Law §2006,2007). If the vote is held in the library, it must be administered by the school district. Some school districts opt to place the library proposition on a capital or bus vote.

Q: If the voters approve the library budget, is the tax money collected for the library mixed with school district funds?

A: No. These tax moneys must be kept separate and must be paid to the treasurer of the library board upon written demand of its trustees. (Ed. Law §259[1]).

Q: Can the school district charge for collecting the library funds from the district taxpayers?

A: No.

Q: Does the library funding appear as part of the school district budget funds?

A: No. Library funds appear as separate lines on the ballot and on the tax bill. (Ed. Law §259[1]).

Q: Is a new budget vote required each year?

A: No. Once the proposition has been accepted by the voters of the district, it is considered an "annual appropriation until changed by further vote." (Ed. Law §259[1]).

Q: If a library vote requesting an increase in funds is defeated, does the library receive any funds?

A: Yes. If a library vote for an increase is defeated, the appropriation reverts to the amount last approved by the voters. A successful vote is considered an annual appropriation until changed by further vote. Ed. Law §259[1]).

Q: How does the tax cap apply for libraries going to the school voters?

A: After the first successful vote, any vote to increase the funding will have to be under the tax cap unless the library board votes (by a 60% margin) to override the cap. The proposition still needs just a majority of votes by school district residents.

3. Benefits for Libraries

- School ballot funds are voted on once and then become annual appropriations. Libraries do not have to go back each year to request funds.
- By taxing voters directly through an annual appropriation, libraries do not have to rely on municipalities for funding that could be cut or reduced at any time and with little or no notice. School ballot funds are steady and secure.
- Libraries can go back on the school ballot after an initial successful vote and ask for additional funds at a later date (one, two, three, or more years later). Even if the vote for additional funds fails, the library still received the annual appropriation from the preceding successful vote. There is no limit to the number of times a new proposition for additional funds can be placed on a school ballot, regardless of past successful or unsuccessful referendums.
- School district funds collected and distributed to the library after a successful vote can be spent in any manner that the library deems appropriate (within the guidelines of Education Law and other applicable legislation). Funds can be saved from one year to the next and do not need to be spent within one fiscal year to be retained by the library. The school district has no say in how or when the funds are used.
- In many cases, going to the school voters spreads the cost of operating the library across more of the people that use the library.

Educate, Don't Advocate

Library funds cannot be used for advocating activities, only educational activities. Simply put, the library can educate people about the upcoming vote, explain what will be done with the increased funding, and explain what will happen to the library without increased funding.

The library cannot tell people to vote yes.

4. Timeline

ACTIVITY	TIMELINE
1. Use Surveys and/or focus groups to assess the community's needs and what they want from the library. a. Collect the data to analyze community needs.	Summer/Fall
2. Craft a strategic plan with data from surveys/focus groups. This plan will be the basis for your campaign: "our community has asked as to provide these programs and services- to meet these needs the library needs increased and stable funding". a. Develop a budget based on the strategic plan	Winter
3. Library board passes a resolution to pursue funds via the school district vote.	Early January
4. Library board and campaign volunteers circulate petition asking that library proposition be put on the ballot. a. Need 25 signatures, but get more in case of dispute	January
5. Library board members and other library supporters attend school board meeting to ask that the library's proposition be placed on the ballot. a. Call or write to the school board clerk/secretary to be placed on agenda, and to check deadlines b. Ask nicely and treat the school as a partner, but remember that they are legally required to put up the library proposition	February or Early March
6. School district published public notice of the vote	Late March (Ed. Law requires at least 30 days, but check with S.D. to be sure)
7. Library board and campaign volunteers distribute publicity, posters, press releases, invite reporters to the library, hold information nights, and publicize through social media and newsletters a. The library can educate, but not advocate b. Be transparent with the library budget and promote the strategic plan	March-May
8. Campaigners call every voter or go door to door to tell people what the library will do for them with the money, ask for their vote a. Keep list of definite Yes voters	No later than 6 weeks out
9. Campaigners call yes voters the day before the election, remind them to vote	3 rd Monday in May
10. Library Proposition Passes	3 rd Tuesday in May
11. Library issues press release after the vote thanking supporters and inviting public to come see new services at the library	3 rd Wednesday in May
12. Library holds thank you party (with private funds) for campaign volunteers and builds goodwill for next campaign	Soon after vote
13. Library follows through on strategic plan; expands hours, buys more materials, improved building, etc	Promptly
14. Library keeps up warm contacts with reporters and supporters as they invite them back repeatedly to show how wonderful improvements to the library are	Continuing
15. The process begins again when the library needs more funding	Next year or two (or more)

5. Campaign Advice

“An effective campaign must present today’s library as a place of possibilities and as a critical asset—for individuals (to find jobs, reeducate themselves and enhance literacy) and for the community (access to technology, continued education and economic benefits)”.

- Geek the Library: A Community Awareness Campaign: A Report to the OCLC Membership
https://www.oclc.org/content/dam/oclc/reports/pdfs/geekthelibrary_all.pdf

This refers back to the need to do surveys and/or focus groups with your community and develop a solid, community-based strategic plan **before** you begin to ask for funding. Identifying community needs and positioning the library to face them puts the library at the heart of the community. Libraries thus positioned stand a better chance of receiving voter support.

When community members ask why the library needs more money, refer to the community feedback and the plan the library has built to address community needs.

Any materials created by the library in support of the vote, must be educational in nature and must not urge people to vote yes. Materials created by library friends groups can advocate. A targeted mailing is considered advocacy. Any library mailings (or e-mailings) from the library about the vote must go to all school district residents.

You can expect to hear from community members who do not want their taxes to increase for any reason. Stress the return on investment (ROI) of public libraries (see the Library Value Calculator.

https://www.nyla.org/max/4DCGI/cms/review.html?Action=CMS_Document&DocID=1181&MenuKey=advocacy) No one spends their dollars more carefully than the public library. Be transparent about the library’s budget and answer their questions respectfully.

Ways to get the word out:

Pamphlets
Fact sheets
Bookmarks
Social media posts
Letters to the editor
Community group presentations
Endorsements from community leaders
Mass mailings

You may hear statements like “nobody uses libraries anymore”. The best counter arguments are the library’s usage statistics. Remember that circulation is only part of the story. Think beyond circulation and provide information on computer use, program attendance, community use of your meeting room (if you have one), and WiFi sessions.

6. Sample Petition Language

Petition Wording – 1 library:

To the (X) Central Board of Education:

We, the undersigned residents of the (X) Central School District would like the following included as a proposition on the (X) Central School District ballot:

Resolved, that pursuant to Education Law, Section 259, the Board of Education of the (X) Central School District is authorized to levy and collect an annual tax, year after year, separate and apart from the annual school district budget, in the amount of \$\$\$\$,\$\$\$, which shall be paid to the (Y) Public Library for the support and maintenance of the library; with this appropriated amount to be the annual appropriation until thereafter modified by a future vote of the electors of the (X) Central School District.

Signature	Printed Name	Address	Date

Petition Wording – 2 Libraries:

To the (X) Central Board of Education:

We, the undersigned residents of the (X) Central School District would like the following included as a proposition on the (X) Central School District ballot:

“Resolved, that pursuant to Education Law, Section 259, the Board of Education of the (X) Central School District is authorized to levy and collect an annual tax, year after year, separate and apart from the annual school district budget, in the amount of \$\$\$\$,\$\$\$\$ of which \$\$\$\$,\$\$\$\$ will be paid to the (Y) Library for the support and maintenance of the library and \$\$\$\$,\$\$\$\$ will be paid to the (Z) Library for the support and maintenance of the library; with this appropriated amount to be the annual appropriation until thereafter modified by a future vote of the electors of the (X) School District.”

Signature	Printed Name	Address	Date

7. Calculating Tax Impact

\$40,000 for the Parish Public Library and the Williamstown Community Library through the Altmar-Parish-Williamstown School District Referendum

School District Information:

Total True Value Assessment: \$261,795,150

Amount Raised Through Taxes: \$5,820,968

$5,820,968 / 261,795,150 = 22.234816$ average rate per thousand before increase (of \$40,000)

\$5,820,968

+ 40,000 (proposed by library)

$5,860,968 / 261,795,150 = 22.387607$ average rate per thousand after increase (of \$40,000)

22.387607 including \$40,000 increase for the library

- 22.234816 without library funding

0.152791 per thousand rate increase in the average assessment

Therefore...

An additional taxation of \$40,000 would cost each taxpayer **15 cents per year for every \$1,000 of assessed property value.**

\$50,000 assessment: $50 \times .152791 = \$7.64$

Providing \$40,000 per year in funding for the libraries in this scenario would cost a person with a property assessed at \$50,000 **\$7.64** per year. Or 64 cents a month!