

# **EXPLORING LIBRARY DISTRICTS: A PLANNING GUIDE**



**MONTANA  
STATE LIBRARY**  
A GREATER STATE OF KNOWLEDGE

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# Chapter 1: Introduction

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This handbook is designed to help you through the process of forming a library district. It is divided into several stages with information about each stage and the steps you must take to form a library district. Before we begin talking about what you must accomplish to create a library district, we would like to take a moment to introduce library districts - what they are and why you might want to consider them.

We would like to thank the Idaho State Library and the Colorado State Library for generously sharing their district handbooks. Much of this handbook is adapted from both of those resources.

## What is a library district in Montana?

A library district is a governmental unit with an elected board of trustees having the power to establish a property tax mill levy for library services. Voters in the district create a library district through an election. A library district must contain territory with a taxable value of at least \$5 million.

## Reasons to consider a library district

- Quality library service in our local communities is an essential part of our economic development, quality of life, and education.
- Library service is not free or cheap.

## Potential benefits of a library district

- Areas with lower property values can create an administrative structure that provides stable funding which helps maintain quality library services.
- The library district structure allows independent public libraries to join forces under a new centralized administrative structure. Centralizing offers the potential for improved library services and cost savings through sharing administrative, personnel, collections, and technology costs.
- City councils and county commissioners are freed from many of their administrative and governing responsibilities to the library.
- Communities can use the library district to improve an important and essential public service.
- The tax levy for a library district provides dedicated and more stable funding.

## Potential disadvantages of becoming a library district

- Forming a library district may not be the right answer for all areas.
- Some local control could be given up.
- Holding a successful election takes considerable effort.
- The complexity of forming a government entity takes a great deal of time and effort.

## Who to contact for help?

Tracy Cook, Lead Consulting & Learning Librarian (406) 431-0685 or [tcook2@mt.gov](mailto:tcook2@mt.gov)

Cara Orban, Consortia Director (406) 444-5350 or [corban@mt.gov](mailto:corban@mt.gov)

Suzanne Reymer, Statewide Consulting Librarian (406) 698-0503 or [sreymer2@mt.gov](mailto:sreymer2@mt.gov)



## Comparing Differences Between Library Governance Structures in Montana

The following tables compare the main types of governing structures for public libraries in Montana. There are several different ways to structure public libraries in Montana. How the library and its local government unit are structured can determine what level of authority the board has as well as how the library is created. These tables are designed to help you understand the difference between an independent library district and other types of libraries.

### Types of Public Libraries and Board Authority

#### City

Guiding MCA	MCA 22-1-303 thru 311
Method of Creation	Vote of the people and/or city resolution
Board Appointment	Mayor/City Council
Budget/Financial Authority	City has authority over tax revenues; Board has authority over line items, setting and monitoring budget, approving claims, accepting grants/donations. Board reports to city. Library budget and financials follow Local Government Budget Act
Facilities/Property	Board owns property in the NAME of the city; board has authority over library space and can make changes to library; board can purchase property
Personnel Management	Board hires, sets duties, salary for chief librarian and library staff
Contracts	Board has authority to sign contracts
# of Libraries	22

#### County

Guiding MCA	MCA 22-1-303 thru 311
Method of Creation	Vote of the people and/or county resolution
Board Appointment	County Commissioners
Budget/Financial Authority	County has authority over tax revenues; Board has authority over line items, setting and monitoring budget, approving claims, accepting grants/donations. Board reports to

	county. Library budget and financials follow Local Government Budget Act
Facilities/Property	Board owns property in the NAME of the county; board has authority over library space and can make changes to library; board can purchase property
Personnel Management	Board hires, sets duties, salary for chief librarian and library staff
Contracts	Board has authority to sign contracts
# of Libraries	28

### Joint City-County

Guiding MCA	MCA 22 1-314 thru 317
Method of Creation	Interlocal agreement – may have been a vote of the people
Board Appointment	Determined by interlocal agreement; generally a mix of city and county
Budget/Financial Authority	Determined by interlocal agreement; generally board has authority over line items per MCA 22-1-309
Facilities/Property	Determined by interlocal agreement; generally the board has the same authority as MCA 22-1-309
Personnel Management	Determined by interlocal agreement; generally board has authority outlined in MCA 22-1-310
Contracts	Determined by interlocal agreement; generally board has authority to sign contracts per MCA 22-1-309
# of Libraries	18

### Multi-jurisdictional Service District

Guiding MCA	MCA 7-11-1102 and 1112
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Method of Creation	Vote of the people
Board Appointment	Determined by interlocal agreement
Budget/Financial Authority	Determined by interlocal agreement; generally board has authority over line items per MCA 22-1-309
Facilities/Property	Determined by interlocal agreement; generally the board has the same authority as MCA 22-1-309
Personnel Management	Determined by interlocal agreement; generally board has authority outlined in MCA 22-1-310
Contracts	Determined by interlocal agreement; generally board has authority to sign contracts per MCA 22-1-309
# of Libraries	5

### Independent Library District

Guiding MCA	MCA 22-1-7
Method of Creation	Vote of the people
Board Appointment	Elected
Budget/Financial Authority	Board works with county; has full authority over budget and line items within the limits of the dedicated property tax mill levy voted on by the community
Facilities/Property	Board owns library property
Personnel Management	Board hires, sets duties, salary for chief librarian and library staff
Contracts	Board has authority to sign contracts
# of Libraries	4

### School/Public

Guiding MCA	MCA 22-1-312 and 7-11-1
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Method of Creation	Interlocal agreement – partnership between school and local government
Board Appointment	Determined by interlocal agreement; generally a mix of school and local govt
Budget/Financial Authority	Determined by interlocal agreement; varies greatly depending on setup of library
Facilities/Property	Usually owned by the school district board and managed by the school district
Personnel Management	Determined by interlocal agreement; varies greatly depending on setup of library
Contracts	Determined by interlocal agreement; varies greatly depending on setup of library
# of Libraries	6 main libraries; 10 branches

*Notes:*

- The powers and duties of the board may change if the library is part of a local government structure that is a charter government. MCA 7-3-7 is what guides this type of government. The local government's charter will spell out the duties of the board.
- Personnel management and facilities management may vary. MSL staff encourage libraries and local government officials to define each other's roles and expectations. We also encourage boards to use the personnel policies of cities and/or counties - with the addition of the role of the board in hiring, etc. of library directors and staff. Facilities management is sometimes handled entirely by the board or more often handled by both entities depending upon the nature of the work being completed.
- Financial authority and how that works in each library varies depending upon whether the library is funded entirely through a dedicated library levy or funded by general fund.
- There are 83 main public libraries. Many of those libraries have branches that may have a different structure than the main library. However - it's usually in the form of a school/community library. There are 34 branches.

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## Chapter 2: Assessment Phase

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Assessment Phase Overview  
Assessment Phase Tasks  
Task A One: Conversations about Library Services  
Task A Two: Forming a Group  
Task A Three: Creating a Vision  
Task A Four: Preliminary Districting Decisions  
Task A Five: Cost Assessments  
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### Assessment Phase Overview

Districting is a complex process. In this book we will discuss the different phases in the districting process. The first one is the assessment phase. This is when you informally assess your local needs for public library service and then use that information to determine if creating a new library district will meet those needs.

You also need to consider if districting is right for you and your community. Creating a new library district is time consuming and difficult. Ask yourselves if you are willing to put in the time and effort involved in the process. Remember that at any time during this districting process, you can call on the State Library for help.

At the end of this assessment phase, ask yourselves - is creating a library district something to pursue?

If your local situation makes a successful districting effort unlikely, or if you are not ready to put in the effort needed to create a library district, look at other alternatives for improving library services.

If districting is a possibility and you are willing to do the work, then you are ready for the formal planning phase.

### Assessment Phase Tasks

There are ten tasks that need to be completed during the assessment phase. We've simplified the process by listing them numerically. Make sure you've addressed these ten tasks. The order in which you do them is not always important. We'll look at each one in detail later. To keep things straight, we have used an alpha/numeric code for the different tasks. We will use the first letter of phase we are in, so in this case tasks are labeled A for assessment.

A1.	Determine if there is a perceived need for a library district through informal conversations with members of the community.
A2.	Form a group of supporters to plan and carry out the assessment phase.
A3.	Create a written vision statement of what a library district could provide.
A4.	Make a preliminary decision about what geographical area will be covered by the library district and about how the district will relate to any existing public library entities within or near this area.
A5.	Assess the potential costs for the district.
A6.	Make formal presentations about library districting to community organizations.
A7.	Identify and contact potential supporters of the library district idea.
A8.	Identify potential opponents of the library district idea.
A9.	Give a formal committee the task of pursuing the library district process.

**Task A One: Conversations about Library Services**

Library districting efforts are about improving current public library service. In some cases, public library service is non-existent, because there is no public library that is easily accessible. In other cases, libraries must charge an annual use fee for certain patrons who do not live in the county. And sometimes libraries do not have the tax base they need to provide adequate library service. In any of these examples, library districts may help. A districting effort that consolidates two or more libraries can often create better library service by eliminating duplication of services and creating economies of scale.

You and others in the community may feel the need to improve library service, but you should assess public interest. You might think of public library service as a public good, but others in the community may not feel this way. This is particularly true when tax dollars are involved.

Informal conversations about improving library service should become more deliberate. Talk about library service with your friends or in the groups to which you belong. Do other people join in the conversation, or is the subject quickly changed? Typically, if there is a perceived need, informal contacts will lead to the telling of “horror stories” about the lack of access to library service or about inadequate service. Horror stories can become the use cases and real problems that a district can solve. If a significant number of library patrons experience the same

horror stories, that can be a compelling reason to do the hard work to create a district.

From the beginning, all libraries and government officials within the proposed district area should be kept informed about the assessment process. This includes library boards, library staff, city councils and/or county commissioners. Objections or even indifference from any of these groups could be fatal to the districting process. If possible, encourage these people (particularly board members) to take a leading role in the districting efforts.

## **Task A Two: Forming a Group**

You need a group of people, rather than an individual, to assess the viability of districting. A library board should be involved in this group, but other members in the community like local leaders, business people, school officials, etc. must be involved. This group will do most of the work of the Assessment Phase. They should create a plan and timeline for carrying out this part of the project. The plan doesn't have to be detailed. It simply needs to list the tasks to be done and an approximate time by which tasks should be completed. At the end of this section, we have included an Assessment Phase checklist. You can use this checklist as is or modify it to meet your needs.

## **Task A Three: Creating a Vision**

The group needs to create a vision statement for the proposed library district. As you move further into the assessment phase, you must go beyond the general idea of improving library services. It is vital that you develop a specific vision of what public library service looks like for your community. Your vision depends upon your community. In some communities the vision will emphasize children; in others it may be retired adults. When you develop a vision for the library district, you must consider your community. If you are not developing a vision in tune with the needs of your community, you will not be successful in your efforts.

How can you begin to develop a vision of what a library district might mean for your community? Visit libraries in similar communities and talk to librarians and board members. These visits will make you aware of what is possible in similar situations.

Access to information is increasingly important in our society. People who are not being served by public libraries will be left behind educationally and economically. It is important that communities make decisions about library services from this perspective.

Holding public meetings can help identify a vision as well. You can ask people to identify what kinds of services they would like to have from a new library district. Try this exercise. Ask people to brainstorm what library services they would like to have within the next ten years. Services can be prioritized, and the vision statement written on the priorities of the community. Attendance at public meetings is sporadic, so be sure and use a variety of ways to find out what the community needs.

When you have collected the information you need, write a vision statement. Use general terms and do not promise specific services. Here are some examples of vision statements:

- Access to resources and opportunities leads to thriving people and connected communities
- As the vibrant community front porch, we aspire to meet the changing needs of our diverse and connected residents.

- An inclusive hub of thought, learning, innovation, collaboration, and leisure, which stimulates the vision and ideals of our communities.

Your vision statement can focus on the expansion of existing library services or the offering of new services. Use clear and concise language, when writing your vision statement.

It should fit on a single sheet of paper and should be no more than a few sentences long. This statement should be used frequently throughout the districting project. Make it positive and highly readable. This statement will be one of the most important ways in which library district supporters will show their enthusiasm for creating a district.

Distributing the vision statement will probably be the first truly “public” act of the group that is leading the districting effort. The library board(s) should officially adopt the statement. It should then be sent to the local news outlet along with a story about the assessment process that the group is conducting. The story should include a way of contacting the group for comments.

## **Task A Four: Preliminary Districting Decisions**

Now you should begin making preliminary decisions about what the proposed library district will look like. Look at every possible option for providing service for your community. In general, larger districts can provide better library services, since they have a stronger financial base and there will be less duplication of services. For communities located far from an existing library, it might be possible for a district to provide better service through a branch, bookmobile, or books-by-mail program.

[22-1-701, MCA](#) states that the territory within a new library district must contain a taxable value of at least \$5 million. Check to see if your proposed district meets this requirement. The county clerk can usually give the group information about the assessed value of a proposed district. If the proposed district doesn't meet this requirement explore other options, such as increasing the boundaries or asking an existing library to join you.

If the proposed district surrounds or is contiguous to other public libraries' service area, confer with those library boards. At this point boards may not be willing to commit to major changes in their operations, but they may be willing to examine possible options in working with a new district. Once they have decided that a new district may benefit them, the library board may be willing to take a leading role in the project.

When planning your district boundaries, look at social and geographical patterns that might affect the new district. Mapping can help you in this process. Begin with a high-quality map of the county or counties involved. Mark cities, schools, libraries, and library branches on the map. If your city or county has a GIS office, the staff in the office can also assist you with creating a map. If you do not have access to GIS staff, the Montana State Library's GIS staff may be able to help you. Please contact one of the staff listed in the first chapter if you need help with a mapping project.

Figure out the patterns of travel within and outside of the potential district by using topographical and road maps. Look at the natural barriers in your area - geographical features such as mountains and rivers. What places are easy to get to; what places are more difficult to reach? Are some parts of the potential district connected to areas outside the district?

Work with your county and/or city clerk to discover the boundaries of other districts, such as weed, mosquito, school, fire, etc. The counties and the Department of Revenue like new

districts to follow these established districts' lines. It is best to work with local government officials when determining logical boundaries.

### **Working in Stages**

There may be political or legal advantages to working through a district creation. Examine alternative methods of achieving the same objective during the assessment stage.

### **Examine All Possibilities**

Any possibility that meets the requirements of Montana law should be considered. Assess the advantages and disadvantages of each option. The result of task four should be a preliminary description of a possible district.

## **Task A Five: Cost Assessments**

You can't give an accurate estimate of operational costs for your area at this stage, but you should give a range of costs. State law requires that the territory included in a public library district contain a taxable value of at least \$5 million. Refer to MCA 15-10-420 for information about the maximum levy for a library district operational budget.

Calculate a somewhat more accurate figure for cost by examining the statistics for libraries serving similar size populations. The State Library publishes statistics for Montana public libraries annually. Average expenditures per capita are calculated for libraries in various size categories. Multiply this per capita figure by the population being served in the proposed district to figure out what a typical district of that size spends for service. Additional costs to consider include:

- costs of an annual trustee election audit
- bookkeeping/payroll
- building costs if they are assumed by the district - which includes lease or purchase, repair and maintenance, utilities, snow removal, landscape, janitorial services, etc.
- personnel administration costs including salaries, insurance, and retirement, along with other benefits.

*Caution:* It is difficult to give accurate figures on the operational costs for a new district. Figures at best will be inexact, so when discussing operational costs give a range of costs rather than a specific cost. If supporters mention a specific cost, people will assume that this figure is the one that must be raised. Later in the districting process, you will be able to provide more accurate figures to the public.

If the new district will have to purchase, build, or extensively remodel a building to provide district services, the exploratory group should include these costs in the total cost estimate as capital costs. Capital costs are the costs of buying or building a library facility. These costs may be raised through bond issues or as part of a depreciation fund. [See MCA 22-1-707]. If there are major capital costs in beginning the library district, state these costs openly and honestly in any estimate of the district's total costs. Opponents of the districting effort will certainly include these costs in their estimates, so it's best to be open about all costs.

The issue of costs is usually one of the most difficult aspects of promoting a new library district. Be open and aboveboard when discussing the costs of a library district and how money will be

raised through property taxes but relate the cost of library services to the value people will receive from those services.

## **Task A Six: Presenting the Idea to the Community**

Begin approaching community groups, once you have identified an interest in districting and you have defined your vision. Ask to be given time at the business meetings of service clubs--such as the Kiwanis and the Rotary - as well as educational organizations - such as the school board and Parent Teacher Association (PTA). Tell these people what you have been thinking about. Present your vision and be honest about the costs. Talk about tax-supported library service.

Try to take at least two people to each group: one to speak and one to record what is said. After the meeting, look at recorded questions and comments. Count the ones that seem positive and the ones that seem negative. Analyze the meeting by answering the questions who said what, what was said, what wasn't said, and why was it said. This is subjective but will add to the value of counting the number of positive versus negative comments. Based on both your objective and subjective analysis of the meeting, determine whether creating a library district is a possibility.

You will need to continue meeting with community groups as you continue the assessment and planning phases. Begin with those who are likely to be the most positive. You will build your own confidence and you will have a reality check on the prospects of success. If organizations that normally support the library are not doing so, then your chances of succeeding are not good.

If you find support where it should be, the next step is to see if there is support in less likely places. Talk to organizations that do not represent educational or community improvement interests. You will learn whether there is adequate support to proceed, and you will begin identifying supporters and opponents to the effort.

## **Task A Seven: Identifying Supporters**

### **General Supporters**

Individuals will begin to identify themselves as supporters, as you work through the Needs Assessment and Visioning task. Keep the names, addresses, and telephone numbers of these people in a file or computerized database.

Determine if you will have adequate volunteer help to carry out the effort. You will need your community's help to succeed. Ask for potential volunteers to sign up, as you meet with supportive groups. Have a sign-up sheet at the library and a sign asking for volunteers to help with the districting effort. A good number of volunteers is a sign of support in the community. If there are few people willing to sign up, there may be inadequate community support to proceed.

Ask potential volunteers for their name, address, email address, and telephone number. You should also ask if they have specific skills that would be useful in the districting effort. Such skills might include computer skills, writing, graphic arts, public speaking, or organizational skills.

### **Opinion Leader Supporters**

Seek opinion leader supporters, as well as general supporters. In general, community leaders who support other educational and governmental services will be most likely to support a

districting effort. Contact these people individually.

Opinion leader supporters will be drawn from the following groups:

*Political leaders*, such as city council members, county commissioners, school board members, and legislators.

*Business leaders*, such as the managers of the leading companies, heads of the chambers of commerce, bankers, and leading representatives from farm, mining, ranching, or timber industry associations.

*Media leaders*, such as newspaper editors, publishers, and the station managers of local radio and television stations.

*Educational leaders*, such as school superintendents, presidents of the local teachers' association; and prominent teachers.

*Social leaders*, such as church leaders and the heads of important community groups and service organizations. Other social leaders may not hold any official position in the community but are generally seen as a powerful force in community life.

Begin searching for opinion leader supporters by listing all the important opinion leaders in your community by name. After your group has created this list, make an initial assessment of whether each person is likely to support the project, oppose the project or will be neutral.

Contact those who you think are likely to be supportive, and then those who you feel will be neutral. Do this individually and by appointment. Explain what you are considering and ask the person whether they would be likely to support such an effort. Assure them that their comments will be kept confidential if that seems necessary. Take notes at the meeting if they are comfortable with the idea.

Compare notes after the meeting. If the person did not want you to take notes, write down your impressions of the meeting as soon as possible. Assess the person's support level:

Very Supportive: will speak for the effort and actively work for it.

Supportive: will speak for the effort, but not work for it.

Neutral: will not speak for or against the effort.

Opposed: will speak against the effort.

Very Opposed: will speak against the effort and actively work against it.

Good support from your community's opinion leaders should encourage you to continue with the effort.

## **Task A Eight: Identifying Opponents**

Identify potential opponents of the districting effort as you identify supporters. When you are identifying opponents focus on those who are community opinion leaders or who represent organized groups. Community leaders who are most likely to oppose a districting effort are those who oppose taxes and tax supported services in general. They may do this out of concern about their own taxes or they may oppose taxes on principle. Other community leaders are not opposed to taxes in general but may see a new district as a threat to other local government services they view as more vital. Whether you should contact opinion leaders who you believe will oppose the districting effort at this point is a political decision that will depend largely on what you know about the person and the community. In some cases, an opinion leader may



become less opposed to a project if contacted. They may see the contact as a sign of respect. On the other hand, if you contact opponents and you continue to work on the project, they may see that as a sign that you disregarded their opinions.

Use the same interviewing process when speaking with those who support, oppose, or are neutral. You are simply seeking information. Do not argue with those who say they are opposed to a library district. Offer to give them more information if they wish it.

The project is probably viable, and you will want to proceed, if you find that the opposition to it is weak.

## **Task A Nine: Recruit New Group Members**

Once you have found support and interest for a district, recruit new members who can help the original group do the work necessary to create a library district. One of the five library board members from each library involved must make a strong commitment to the project and no board members should oppose it. *If strong support is not available from the existing library board(s), the districting project will almost certainly not work.* Other community members should be included in the group.

It is essential that the library director and other staff support the project. Staff members often fear that districting may threaten their employment or their benefits. Be honest with the staff on these points. In some cases, districting will have little effect on the employment or working conditions of the staff. In other cases, districting may have very serious implications for staff.

It is probably too early to determine exactly how the districting effort will affect staff members, but you need to deal with the staff in good faith. State up-front that the districting project will make major changes in the conditions of their employment if that is the case. Assure staff that their concerns will be considered as the districting process moves forward. Be sure to include all relevant stakeholders in your conversation – staff, union representation, and even the local government's human resources' staff.

Include staff representative in the group but ask them to be open-minded about the process. Educate potential group members about the commitment they are making before asking them to join the group. Districting projects involve running an election and will entail a great deal of work. Because of this, group members should have a complete understanding of the process. Hold a meeting with all potential members of a group. State Library personnel can talk to the group about the districting process and the many steps that need to be taken. Have someone from another districting project talk about their experience, as they can give potential members a more accurate picture of what happens.

Ask people to make a commitment at the end of the meeting. Another sign of a successful districting project is the formation of a good group that includes some of the community's opinion leaders.

## **Reality Checks**

The Assessment Phase is the time to determine whether a successful districting effort is possible and to make some preliminary decisions about what a district might look like. Make time for reality checks throughout the entire districting process.

Reality checks should be group activities that can be included on the agendas of regular

meetings, or they can be the sole purpose of a meeting. When conducting a reality check, review the list of tasks that should have been completed. Ask whether the tasks have been completed and whether the information gained indicates that a districting effort is likely to be successful. Examine documentation that has been developed as part of the process.

Ask people about their own energy level and enthusiasm for the project. It is especially important to check with library board members to see about their level of commitment.

If a reality check is positive, then it will encourage the group to continue with the project. If the reality check indicates that there are problems, then it may indicate that the group needs to change direction, slow down, or that a district library is not possible under present conditions. Find this out during the Assessment Phase, before a great deal of time, energy, and money is poured into the effort. If the Assessment Phase makes it clear that a districting effort is likely to fail, discuss other options for obtaining or improving library services. These options can be explored with State Library personnel.

## Chapter 3: Planning Phase

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Overview

Tasks

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Planning Phase Forms

### Planning Phase - Overview

The planning phase is the next step in the districting process after you have determined that creating a district is possible and beneficial to the community. This is more formal than the assessment phase of the process. The depth of planning required will depend upon the size of changes you expect. Determine how much planning is necessary for your project. The fewer surprises you experience in the districting project, the more likely its success. Planning helps eliminate surprises.

### Planning Phase Tasks

This is a time of preparation. You will decide what your library district will look like, and you will gather information that will allow the district to be created. Some of this information will be used after the district has been created, but knowing what needs to be done and having plans will make the hectic first few months easier for everyone involved. The group's efforts in the planning phase will culminate in the official actions of the new district's library board during the first few weeks of operation.

Several tasks need to be accomplished during the planning phase. You do not have to do these

in this order, but you need to work through the following tasks:

P1.	“Plan to plan.” Decide how to do the planning necessary to create and operate a district.
P2.	Plan how to carry out public relations to build support for the districting effort.
P3.	Coordinate your efforts with local government officials who will have responsibilities in creating the new district.
P4.	Plan the library services offered by the new district.
P5.	Begin planning for the administrative structure (board structure and by-laws, etc.) of the new district.
P6.	Recommend personnel policies for the new district.
P7.	Plan the library facilities for the new district.
P8.	Make an accurate estimate of first year and long-range costs for the new district and how the district will handle the cost of its first-year operations.
P9.	Make final decisions about the geographic area that will be included in the new district.

### **Task P One: Planning to Plan**

Write down the plan for moving through this phase. It is essential. The plan should identify:

- What steps will be taken and when
- Who will be responsible for various roles in the process
- How information will be gathered
- How decisions will be made
- Who will act as spokespersons for the group
- When meetings will be held
- How the process will be evaluated
- How and when reality checks will be made

### **Task P Two: Planning Public Relations**

The importance of public relations cannot be overemphasized. A public relations program is more than just publicity. It involves choosing one or two important messages and then designing a systematic program to carry the message(s) to the public. The way that the message is

conveyed is vital. Brochures, newspaper articles, etc. are essential. It is also important to make personal contacts.

Library board members must participate in the public relations work for the new district. Board members must show their support for the new district by speaking out to individuals and to groups.

Repetition of the message is vital. Everyone speaking for the districting effort needs to say the same thing. Use the same slogan and graphics repeatedly in brochures and other media, so that the message becomes identifiable in the public mind.

Make the message a part of community events that relate to community pride. Plan to make the districting effort visible at such activities as county fairs, parades, and other special community events.

Endorsements by both groups and individuals are vital. Groups that work with children, such as 4-H, Girl and Boy Scouts, are likely to endorse efforts to improve library services. Other groups like parent teacher associations, school boards, etc. that emphasize community involvement and education are likely to be supportive. Seek out prominent community leaders for endorsements. Use the list of supportive contacts and groups that you developed in the assessment phase. Some groups may be willing to either pay for advertisements announcing their endorsements, or to write a letter to the editor announcing their support. Develop a schedule for seeking and releasing news of endorsements throughout the districting project.

Assure that public relations are carried out in a systematic and effective way by developing and implementing a public relations plan. Ideally, a public relations professional should do the plan.

Include the following items in the public relations plan:

- Message(s) that will be emphasized in the public relations campaign
- Slogan(s) that will carry the message
- Graphics that will carry the message
- Brochures that will carry the message
- Calendar of events and activities that will carry the message
- Lists of local media outlets, including contact persons that will be informed of districting activities.
- Community organizations that will be contacted
- Methods for soliciting and publicizing endorsements for creating a library district
- Training program for spokespersons (particularly board members) to speak for the districting project

### **Task P Three: Coordinating Government Participation**

Keep local government officials informed throughout the process. Educate local officials about their responsibilities and be prepared to negotiate about how the process will be carried out. We will discuss the responsibilities of city and county governments next.

*City Government.* Working with city councils is important. City council members are opinion leaders in the community, so they must be informed about the districting process. Talk to city council members about the district and how it affects their library. Educate them about the

various options open to them and the advantages and disadvantages of each.

The city council and the new library district may need to work together to resolve many issues. It is imperative that the city council of an established city library be included in the planning process for a district that would like to include that city. If the current city library is funded through the general fund, the city council can decide to reduce property taxes by the amount currently paid for library services if the election passes. The city council can also greatly influence the ease of transition from a city library to a district library. If the city owns the library facility, it must agree to continued use of the library building. The council can also decide to provide transitional funding during the first year of the district's existence. These powers influence the operation of the district during its crucial first year of service.

Keep city councils informed about the process and consider their attitude about the process when deciding whether the city should be included in the proposed district.

Conduct negotiations on the continued use of city library facilities, of transitional funding, and of the reduction of the city budget for the portion used for library services during the planning phase. You can find more information on these negotiations later in this section.

Include sympathetic members of the council or sympathetic city clerks in the group for the district. It is the best way to work with city governments. Doing this assures the council that it will receive accurate information about the group's plans, and it gives the districting effort an informed advocate at city council meetings. If this cannot be done, work hard to keep the council informed about your work by sending the council the group's meeting reports. Try to report to the city council meetings on a regular basis.

### **County Government**

County government officials carry a great deal of political power and are responsible for carrying out many of the legal activities of the districting process. County commissioners are responsible for receiving the petition for establishment, holding a hearing, carrying out some or all election procedures, and issuing the order that the district is established if the election is successful. After a successful election, county commissioners appoint the first district board.

Include county officials in the group. If they do not have the time or interest to do this, you need to educate them about the process and their role in it.

County commissioners and the county clerk are probably not aware of their responsibilities in this matter. Meet with both the commissioners and the county clerk to discuss the districting process. County officials must understand their legal responsibilities for carrying out and paying for election procedures. Be prepared to work closely with the county attorney. Interpretations of state district law requirements, election requirements, and standard practices of the county commission may differ in some manner from county to county. It is important to discuss and resolve differing legal points of view to prevent them from becoming roadblocks to the district process.

Begin the education process with the county clerk since this person will do most of the work. Work hard to keep this relationship and others cordial. Have one or two people develop an on-going relationship with the county clerk. This gives the county clerk a point of contact that they can become comfortable with. Approaching the clerk with a larger group of people may make the clerk feel that you are trying to intimidate them.

Ask the county clerk for their advice, as they usually have a great deal of useful information. Be prepared to hear about the county clerk's particular issues with the process and look for ways to compromise if problems occur.

The election's timing process can cause problems for the county when it holds the election. If proposed district boundaries do not follow voting precinct lines, it can make election procedures more complicated. To solve these problems, try conducting an election when other elections are being held or redraw district boundaries to coincide with precinct boundaries. Give the county time to budget for an election by informing them of the election date as far in advance as possible. Consider compromises if they do not drastically interfere with the districting process.

Once you have worked with the county clerk, schedule a meeting with the county commissioners to explain the process and ask for support. Send written reports to the commissioners and county clerk throughout the process. At strategic times, contact the county clerk and make oral reports at county commissioners' meetings.

### **The New Board of Trustees**

County commissioners appoint the board for the new district. This gives the commissioners power over the district at the beginning of its existence. Come to some understanding with the commissioners about whom should be appointed to the board. Usually, the commissioners will be happy to receive suggestions about these appointees. They may even ask you to provide a suggested list for all positions, so have a list available and discuss this issue with the commissioners. If two or more counties are forming a district, then the counties jointly appoint the first board. After the first board members have served their respective terms, board members are elected by the public.

### **What if the County Commissioners Do Not Favor a Library District?**

Consider whether to proceed. Commissioners hold a lot of power over the districting process and the first year of operation. If they are openly opposed to the idea, you may want to take the time to work with the commissioners until they are agreeable to the districting project.

## **Task P Four: Planning Library Services.**

Turn the vision developed in the assessment phase into a practical plan for providing specific library services. There are several models for planning. Some were developed for libraries. Others are more general. Good models of planning include the following elements:

- A focus on community needs
- Roles that the library district will fulfill for its community
- Goals for the library
- Objectives that help the library achieve its goals
- Activities that lead to accomplishment of objectives
- An evaluation method for the plan

Contact the Montana State Library for help with planning.

### **Methods for Planning**

The methods that you use for planning depend upon the level of planning that is required.

Extensive input from the public should be sought if you are writing a new plan or making major changes to existing library services. Here are ways to gather public input:

*User surveys* - Ask current users about their library use - what they like and what they would like to see changed. This method reaches out to the most likely supporters of the new district and is relatively easy and cheap to conduct. It has the disadvantage of only reaching current users and will not reach those who might benefit most from a new district.

*Community surveys* - Survey people in the community about the library and potential services. This method reaches out to the whole community. Asking people about library services helps them understand the possibilities that exist with a district library. The survey also contributes to public relations for the district effort. Its disadvantage is that it is expensive and time-consuming to administer.

*Focus groups* - Bring small groups (8-10 people) together to discuss library services - what they like and what they would like to have from a new district. This method is more personal, and participants are allowed to react in depth. You can target a particular audience, such as parents, community leaders, teenagers, etc. This process is time-consuming to administer, and it reaches relatively few people. The results require a good deal of interpretation.

*Facilitated Community Meetings* - Hold a meeting for any person who wishes to discuss the library. Facilitate the meeting, so that every person in attendance has an opportunity to express their opinions. Participants get to hear what other people are thinking and they can express their own opinions. Advertising the meeting contributes to the public relations effort of the districting project. Unfortunately, turnout is often low and the information gathered does not necessarily represent a true cross-section of the community.

Use these methods throughout the planning process to gather information about the plan. An intensive planning process contributes to the public relations aspects of the districting effort, since continually asking the public for input about library services offers ownership to those services.

The value of the information gathered from these methods depends on the quality of work that has gone into each of them. Seek professional help in designing surveys. If that is not possible, find help at local institutions of higher learning, which may view this kind of surveying as an ideal student project.

## **Task P Five: Planning Administrative Structures**

Administrative changes in governance, financial management, legal services, library policies, and risk management will occur in the districting process. You should do the groundwork for these policies and procedures, even though the new board will have to finalize the changes. Some of the administrative changes that might occur are:

### **Name Change**

In many cases, a name change will be made through the order of the county commissioners after a successful election. Any change of name should be sent to governmental agencies (such as the Internal Revenue Service, the State Library, etc.) and to major suppliers (such as book and periodical jobbers).



## **Board Structure**

Public library districts can have five or seven members. (See Montana Code Annotated 22-1-702.) The county commission will appoint the first board. If two or more counties combine to create a library district, then the counties jointly appoint the first board. The public elects succeeding boards. You may also wish to develop a district election plan. More information about this can be found in Montana Code Annotated (MCA) 22-1-706.

## **Financial System**

Financial systems that meet generally accepted accounting standards for local governments should be developed. Keep the procedures as simple as possible within this definition. Employ an accountant (preferably a Certified Public Accountant) to set up the new district's financial procedures. Plan to set up accounts with financial institutions. These accounts must be in accordance with the Local Government Financial Administration and Taxation laws, MCA Title 7, Chapter 6. You may also want to investigate the possibility of placing new district funds in the state's investment pool. More information about this can be found at MCA 17-6-204.

## **Legal Representation**

Consider how you will employ legal counsel. It is important to ask for a legal opinion when establishing new policies and procedures. Normally districts only hire attorneys on an as-needed basis. However, it is useful to find an attorney to work with throughout the districting process.

## **Library Policies**

Develop by-laws for the board. You need policies in the areas of collection development, circulation, hours of operation, emergency procedures, and programming for adults and children. You may also need policies dealing with branch operations, use of meeting rooms and other resources, as applicable. These policies cannot be finalized until a district board is appointed. Voters or petitioners may be interested in how the new district will operate, which is where drafts of your policies can help.

## **Risk Management and Insurance**

Consider errors or omission insurance for the district board, along with liability, theft, fire, and damage insurance for the building.

## **Task P Six: Planning Personnel Issues**

This is one of the most important areas of decision-making. Changes in personnel policies range from none to completely new policies. Here are the different kinds of changes that can occur.

### **Little or No Change**

This occurs when an existing library chooses to be closely tied to county government or when the new district does not operate a library, but contracts with an existing library for services.

In these cases, all the district's personnel are employed under a previously established library or administrative structure. Salaries and benefits remain the same. If the name doesn't change,

then no further work is needed.

If the name is changed, then the new name will need to be reported to federal and state income tax agencies, the state insurance fund for workers compensation, and the state department of employment for unemployment insurance coverage. Insurance and other companies providing personnel benefits will need to be notified of the legal name change.

### **Creating a New Personnel System**

This occurs when the new district is created where no library has existed.

Consider the salary structure by checking with other libraries in the area to see what they are paying. Look at similar jobs in your community, as you will be competing with other community employers for employees.

Establish the following required accounts:

- Federal income tax accounts
- State income tax accounts
- Social security
- Workers compensation
- Unemployment insurance

Examine the following as possible benefits:

- Health insurance
- Life insurance
- Retirement usually through the Public Employee Retirement Administration (PERA)

Final decisions will be made by the new board, based upon recommendations of the group.

### **Transfer from a City/County to a District Personnel System**

This occurs:

- When a city or county library becomes a district library.

Establish the following required accounts:

- Federal income tax accounts
- State income tax accounts
- Social security
- Workers compensation
- Unemployment insurance

Examine the following as possible benefits:

- Health insurance
- Life insurance
- Retirement usually through the Public Employee Retirement Administration (PERA)

You must reach agreements with the city or county about transferring employees from the city or county to district payroll. Avoid confusion by having a written memorandum of agreement with the city or county.

*Only the new district board will be able to finalize any of these policies. The group makes recommendations to the board.*

### **General Information on Personnel Administration and Benefits**

It is not possible to cover all aspects of personnel administration for a new district, but the following might be useful:

*Federal Income Tax, Social Security and Medicare.* Register as an employer with the Internal Revenue Service and file W-4 forms for all employees. Upon doing so, you will receive a federal tax number and deposit coupon book. Payments for federal income tax withholding, social security and Medicare are made using this book. For your convenience, you can apply for a Federal Identification Number by registering with the State of Montana.

The new district will need to fill out and keep on file “Employment Eligibility Verification: (I-9 Form) forms for the Department of Immigration and Naturalization.

*State Income Tax.* Register as an employer with the State of Montana Department of Revenue. Upon doing so, you will receive a state income tax number.

*Worker’s Compensation.* Register as an employer with the Department of Labor and Industry and begin paying for worker’s compensation. The Department of Labor and Industry will work with you on determining the amount to be paid for worker’s compensation.

*Unemployment Insurance.* Purchase unemployment insurance. For information about purchasing unemployment insurance, contact the Unemployment Insurance Division of the Department of Labor and Industry.

### **Optional Benefits**

*Montana Public Employees Retirement Administration (MPERA).* MPERA is the retirement program for Montana state employees. Local government entities can also become members of MPERA. You are not required to participate, but if you wish to look at this option contact the Montana Public Employee Retirement Administration.

*Health Insurance.* Contact the county clerk for ideas on how to obtain health and/or life insurance. The district may be unable to pay for these benefits on its own. Consider partnering with another entity to obtain these benefits. Options include the chamber of commerce, a local insurance agent, or contracting with local governments to be included in their pool.

## **Task P Seven: Planning for Facilities**

Planning for facilities depends upon what kind of districting project is being contemplated. Planning for facilities falls into two categories: obtaining a new facility or securing the present library facility.

*New Facilities* - Will the new district need a new facility? This could be the case in a district where there is no existing library, there is a need for a branch, or the current facility is inadequate.

*Existing Facilities* - Services can be provided via facilities that are already being used as libraries. The group must negotiate with the city/county to secure the library building. Local governments may turn the building over to the new district. If not, the district may have to purchase the building, work out rental agreements, or find another facility. If the library is part of a local government building, the group should negotiate with the city or county about rent and utilities. These negotiations must be completed before the creation of the district, so that voters will know what the cost of the district is likely to be.

When an agreement is reached on how facilities will be transferred, a memorandum of agreement should be written with the city or county to clarify the terms of transfer, purchase, or rental.

**NOTE:** Cities or counties may be willing to let a new district library stay in the old library building, while the city maintains ownership and continues to pay the utilities. This seems like a good arrangement, but you may be opening yourself up to several problems. Taxpayers may complain about being double taxed for the library, since they are paying district, and city or county taxes. Another possible problem is a new administration may want the district to pay rent and utilities which would lead to unexpected budget demands.

*Other Facility Expenses* - Consider insurance, utility costs, maintenance and repair costs when making decisions about facilities. Seek out local opinions about the current structure. Is it sound? Is the flooring support in accord with the building codes that apply to book shelving? What is a typical utility bill? Are there any special problems? Answer these questions before deciding about new facilities.

## **Task P Eight: Determining Costs and Levy**

Determine the cost of the new district. Because you are working on plans for personnel and facilities, you should be able to make a much more accurate estimate of the first year and long term costs for the new district. Montana property tax laws determine maximums that can be levied each year. **Tax laws are complicated, so contact your city clerk or recorder for help.**

### **Estimating the Budget for a New District**

Prepare a draft first year operational budget for the new district. Estimate the costs of services and then the amount you expect to collect from non-levy sources. Non-levy income sources include gifts, fines, fees, rental payments, etc.

### **First Year Operations**

The district will not receive money from a levy until well into the first year, so you need to plan for how you will pay for the first year.

How can the new district cope with this problem?

*Continued City/County Support* - Cities/Counties are sometimes willing to continue funding the library until tax dollars are collected for district library services. Discuss this possibility with the local government. If the city or county accepts the idea, develop a memorandum of agreement.

*Current Levy* – If the library has a dedicated mill levy, property owners during the transition year will continue to pay the current levy. The old

levy will end when the library becomes a district and starts receiving funds.

### **Other Issues**

*Non-payment of Taxes* - Consider the problem of non-payment of taxes when determining the levy for the new district. Find out from your county clerk what amount is normally collected in your area. Use this figure to determine how much you will need to levy to cover your operations. For example, if 90% of the amount levied is collected, the new district's levy should be 10% higher than what is needed, so that what is collected will meet the needs of the library. Remember you can only do this up to the legal levy limit. Please refer to MCA 15-10-420 for more information about levies.

*Cash Reserve* - The new district will need to have a cash reserve. The fiscal year for a district runs from July 1 to June 30. Because tax dollars come in at various times in the year local government entities are expected to carry a cash reserve to meet their obligations. Be sure and build this cash reserve into your operational expenses. For more information about cash reserves, contact the Montana State Library or refer to MCA 22-1-707.

*Tax Increase Limitations* - Current law limits the annual increase in taxes for taxing districts. The maximum increase is based on the inflation average of three years. Taxing entities can only increase the taxes by half that average inflation rate. The first-year budget is the base budget, so it is best to guess high when it comes to expenses. Once the base budget is set, it will not be easy to change.

*Financial Planning and Public Relations* - Public financing is complicated and difficult for the public to fully understand. The group needs to create a plan for financing the district for at least the first five years of the district's life. Describe what a typical taxpayer will pay in each year of the plan. Figure out the taxes that would be assessed on houses with a taxable value of \$50,000 and \$100,000, a farm worth \$100,000, and a business with a value of \$200,000.

Someone in the group should acquire a more in-depth understanding of how taxes and tax rates are figured. The County Treasurer can help people learn more about tax exemptions and other tax information when figuring out actual tax charges. This person can then discuss the tax implications of library districting.

**NOTE: If a taxpayer wants to know how much the district will raise taxes, the taxpayer should speak with the County Treasurer or an individual working for the county who can calculate the figures.**

Prepare a fact sheet showing the expected operational levy for each year under the plan. Explain the factors outlined above in the fact sheet. Anyone speaking for the district should understand the financial plan for the first five years. Be prepared to speak about it.

Discuss costs and services together, so the community understands the relationship between the two. Estimate replacement costs (what would it cost an individual to obtain the service if the library district did not provide it) to highlight the potential savings a district might render.

Accompany the fact sheet on levy rates and typical tax charges with a sheet showing the typical cost of a book in a bookstore, a trip to the closest library to borrow a book, the cost of magazine subscriptions, the cost of purchasing a talking book tape, the cost of video rentals, the cost of access to electronic databases, and other information sources.

*Anticipated Cash Flow* - Chart the district's anticipated cash flow for the years of the districting project. Use this chart to show when you expect income and what kind of income to become available. Use it to identify grant applications and other deadlines that are important for obtaining income.

**NOTE: Although the group can put together a plan for district finances, only the new district board will have the power to implement the plan.**

## **Task P Nine: Final Districting Decisions**

During the Assessment Phase, a preliminary description of the new district was made. It may have become obvious during the Planning Phase that the description needs to be modified. Determine the final boundaries of the district with a reality check of the politics of the situation. Look at a smaller district, if a larger one simply isn't feasible. You must use your own assessment of the situation to make these decisions. Other territory can be added later.

Once you have determined your boundaries work with the county attorney to describe the boundaries using accepted legal terms.

## Chapter 4: Decision Phase

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Establishment

Election

Decision Phase Tasks

Task D One: Draft the Petition and Its Contents

Task D Two: Setting the Election Date

Task D Three: Creating an Election Calendar

Task D Four: Plan Public Relations

Task D Five: Circulating Petitions

Task D Six: The Hearing with the County Commissioners

Task D Seven: Conducting the Election

Decision Phase Forms

### Establishment

We will look at the legal methods by which the public will decide whether to create a library district. There are two approaches by which public library districts can be formed in Montana, by petition to the county governing body or by a resolution of the county governing body. Both ultimately require approval by voters residing within the boundaries of the proposed district.

*Establishment* - This information is based on MCA 22-1-702. Be advised that the steps outlined herein are of a summary nature only. Users of this handbook are encouraged to refer to MCA to determine the required legal steps necessary to form a district. A public library district may be created by using either of the following options:

#### Option 1 - By Petition Process

Step 1.	Filing of a legal petition with the county clerk
Step 2.	The governing body of the county conducts an open hearing
Step 3.	If the governing body views the open hearing results as supportive of a public library district, it adopts a resolution which sets the boundaries, maximum mill levy, and number of trustees for the proposed district, and calls for an election on the question of whether to create the district.
Step 4.	An election is held.
Step 5.	If a majority of the votes cast at the election approve formation of a district, the governing body of each county with territory included in the proposed public library district shall certify that the district is formed and appoint the initial members of the district's board of trustees.

**Option 2 - By County Commission Resolution**

Step 1.	A resolution of intent to form a public library district is adopted by the governing body of the county. This resolution schedules a public hearing on the question of forming the district and sets forth the various issues that should be considered at that hearing.
Step 2.	The governing body of the county conducts an open hearing.
Step 3.	If the governing body views the open hearing results as supportive of a public library district, it adopts a resolution which sets the boundaries, maximum mill levy, and number of trustees for the proposed district, and calls for an election on the question of whether to create the district.
Step 4.	An election is held.
Step 5.	If a majority of the votes cast at the election approve formation of a district, the governing body of each county with territory included in the proposed public library district shall certify that the district is formed and appoint the initial members of the district’s board of trustees.

**Election Tasks**

When beginning the election, the following tasks must be done. See [Title 13: Elections of the Montana Code Annotated](#) for specifics about elections.

D1.	Draft the petition and its contents. (if required).
D2.	Decide upon an election date.
D3.	Create a calendar and checklist of activities.
D4.	Devise and implement a public relations plan.
D5.	Carry out the petition procedure. (if required).
D6.	The county commissioners need to carry out hearing procedures on the proposed district.
D7.	The county commissioners carry out an election on whether to create the district.



## **Task D One: Draft the Petition and Its Contents**

The petition language and the eventual ballot language must match and be legally sound as approved by the county attorney. The petition must contain the boundaries of the proposed public library district; a map showing the boundaries; the proposed maximum property tax mill levy that could be levied on property owners within the district for the operation of the district; and the proposed number of members on the board of trustees, five or seven. The petition's text must be published in a newspaper in accord with MCA 7-1-2121.

During the Planning Phase, you decided upon your boundaries. In this phase, you must make it legal by using appropriate terminology and providing a map. Ask your county attorney if they can help you create a legal description and map for the district. Or you can hire an engineer or surveying firm to provide you with both of those items.

Name the district. Choose something that describes the geographic area covered and add the words public library district to it.

List the proposed maximum property tax mill levy, which you should have figured out in the Planning Phase. During that phase, you should have also decided the initial appointment and number of trustees for the elected district board.

## **Task D Two: Setting the Election Date**

According to MCA 22-1-702, the election can be held in conjunction with a regular or primary election or it can be conducted by mail ballot. General elections are held the first Tuesday after the first Monday in November. Primary elections are held the first Tuesday after the first Monday in June and September.

There are financial advantages to holding an election when other elections are taking place. MCA 13-1-302 gives counties the responsibility for carrying out and paying for the election to establish a library district. Holding an election can be expensive, so county officials may be more favorable to districting if the election is held in conjunction with other elections.

Other circumstances may affect the election date choice. Think carefully about the election date and do some research on the history of local elections. Ask yourself the following questions:

- Have there been election dates where bond issues or districting elections have been particularly successful or unsuccessful?
- Are there dates when people are more or less likely to vote?
- Are there other bond issues or controversial items planned for any particular date?

Choosing the election date is a critical decision, as it will drive your calendar, can affect the costs of districting, and will influence other decisions during this phase of the districting project.

## **Task D Three: Creating an Election Calendar**

Several preliminary steps must be taken for an election to be held. These steps are collecting signatures on a petition (if a petition is required), presenting these petitions to the county commissioners, notifying the public of a hearing held by the county commissioners, the hearing itself, issuing an order by the county commissioners, publicizing an election notice by the county clerk, and the election itself.

Each of these steps must be taken within a certain time frame, so if you carry out any steps too early or too late, you could jeopardize the election. Create an election calendar that lists the timeline for each step in the process.

### **Task D Four: Plan Public Relations**

You completed most of this in the Planning Phase, but the election may require a special plan. Base it on the one you created for non-election public relations but emphasize the importance of people voting on Election Day.

In accord with Montana election laws, form a Political Committee that is a totally independent entity. This committee will solicit, collect, expend, and track election contributions and expenditures. Advertisements for the election should carry the name of the committee and the name of the treasurer. You don't want this to become an issue during your campaign, so take precautions beyond what is legally required. The [Montana Commissioner of Political Practices' website](#) has guidance on running campaigns.

### **Task D Five: Circulating Petitions**

Petitions containing the name of not less than 15% of voters must be presented to the county commissioners unless that governing body chooses to initiate the district without requiring a petition. Get as many signatures as possible to avoid problems if some names are disqualified. More names also show support for the district.

- Petition carriers should be active supporters for the library district. If possible, ask for help from people who are property owners, have good standing in the community, and understand the issues. Hold a meeting where both the library issues and the petition process are explained to petition carriers.
- Provide good written and oral instructions for petition carriers. Give the carriers these instructions to assure that the petitions will be correct and legal. Use the petition process as a public relations tool for the district.

Here are some tips and instructions for petition carriers:

- Petition carriers must be registered voters within the proposed district.
- Petition signers must be registered voters within the proposed district. If the signer isn't sure whether they are a registered voter, recommend they not sign the petition until they verify residency and voter registration.
- Signers must include their entire address, city and zip code and length of residence.
- Telephone numbers are optional. Carriers should explain this to signers and let signers know that the telephone numbers will only be used to remind the signer of the hearing and to vote at the election.
- Petition carriers should sign their own petition on one of the signer's lines as well as making the notarized signature at the bottom of the petition.
- Petition carriers should not allow anyone to sign for another person.
- Petition carriers should not promise anything about tax levies. Refer questions about district financing to the Planning Group's financial committee.
- Petition carriers should inform signers of the hearing process and ask them to attend.

- Petition carriers must sign the bottom of the petition in the presence of a notary public, and they must have their signature notarized. This is extremely important, as *all names will be invalidated if the petition is not notarized.*
- Turn in petitions by a certain date.
- Have petition carriers turn in the petition to the district project coordinator or group rather than the county clerk. The petitions can then be checked for flaws, etc. before they are officially turned in.

Once you have presented the petition to the county clerk, they have 15 days to either reject the petition if it is insufficient or certify that the petition is sufficient.

## **Task D Six: The Hearing with the County Commissioners**

You should have already discussed the hearing process and a timetable with the clerk and commissioners.

### **Hearing Date**

The county commissioners are required by law to set a time and place for a hearing once the certified petitions have been presented. The hearing can be part of a regular county commission meeting.

### **Hearing Itself**

This is an opportunity for the public to speak about their concerns with the districting project. MCA 22-1-702 requires the commissioners to hear testimony about:

- whether a district should be created
- the proposed boundary, the property tax mill levy, and the number of members of the board of trustees
- any other matters relating to the proposed district

Hearings may be formal, where speakers must sign up at the beginning of the meeting, and each person is only allowed to speak once. Or they may be informal, where people are allowed to speak back and forth on the issue. Find out how your county commissioners normally conduct hearings and prepare accordingly.

People who oppose the district will attend and speak at the hearing, so have proponents of the district speak at the hearing. Here are some hints about how to make a good impression:

- Ask community leaders to be present and speak in favor of the district.
- Put together a team of speakers to address different issues.
- Ask people to come to the hearing, even if they do not wish to speak.
- Anticipate the arguments that will be made against the district and plan on answering them.
- Ask that your most knowledgeable speakers be allowed to present last if people are only allowed to talk once. This lets them answer any arguments against the district.
- Hold a practice session a week before the hearing. Have all those who plan to speak give their presentation. Have a devil's advocate speak against the formation of a

district.

After the hearing, county commissioners have two options:

- Adopt a resolution which sets the boundaries of the district, the maximum mill levy, and the number of members on the board of trustees; and schedules an election on the question, or,
- Decline to move forward on the district if they are not convinced by the results of the hearing that the issues surrounding the proposed district have been satisfactorily addressed.

### **Existing Public Libraries and the Hearing**

Public libraries not interested in consolidating with the district should indicate so as part of the public hearing process. Those libraries that are interested in consolidating with the district should talk to their governing body. The governing body of the city or county needs to hold a hearing to discuss whether the library should be included in the district. If the governing body determines that the library should be included in the district, it needs to adopt a resolution following the public hearing. See MCA 22-1-705 for more information.

### **Task D Seven: Conducting the Election**

The county must carry out and pay for the election procedures. According to MCA 22-1-702, the election must be conducted in accordance with Title 13 of the Montana Code Annotated. Only qualified electors residing within the proposed public library district may vote. According to MCA 22-1-703, the ballot must contain the following wording:

\_\_\_\_\_ FOR the creation of a public library district that may levy not more than \_\_\_\_\_ mills of property tax for the operation of the district.

\_\_\_\_\_ AGAINST the creation of a public library district.

Stay in touch with the county clerk through the election process and monitor the various election processes that need to be completed.

### **Getting Out the Vote**

Make up lists of supporters including names and phone numbers. Offer rides to those who cannot easily get to the polls. Obviously, you should make these preparations in advance of the election itself.

*Getting people to vote is important. Elections have been lost because of poor turnout in precincts. Even though people supported the effort, they forgot to vote. Creating a good list of supporters and reminding them to vote on Election Day is extremely important.*

### **Results Certification, Canvassing, and the Creation Order**

If the majority of voters favor the district formation, the county commissioners must certify that the district is formed within 10 days. The county commissioners then have 30 days after the certification to appoint initial members of the district's board of trustees. Refer to MCA 22-1-704 for more information.

### **After District Formation.**

After the district is formed, cities with an agreement from the district trustees pass resolutions to have their existing libraries consolidated into the district.

## Chapter 5: Outcomes and Alternatives Phase

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Overview/Tasks

Task O One: Analyze the Election Campaign and Results

Task O Two: Re-examine Alternatives

Task O Three: Proceeding

### **Outcomes/Alternatives Overview/Tasks**

Careful planning will save you some heartache. You should have addressed the things we talked about earlier. This phase will discuss what happens with an unsuccessful election and what happens when you win.

Whether you win or lose, remember that you are trying to improve your community. Change isn't easy, and sometimes it takes more than one attempt to succeed. Remember our communities need quality library service. We provide a place for people to learn, connect, and grow.

### **Contingency Plans**

There are two possible results of an election, winning and losing. Keep in mind; many wonderful projects have ended with an unsuccessful election. Sometimes even when you do everything right, other issues cause you to lose. Perhaps there was an unpopular item on the ballot that influenced the voter's decision; maybe your supporters didn't get out to vote. The educational effort involved in districting may require a couple of unsuccessful elections before you succeed. Because failure is a possibility, take time to decide how to handle a lost election.

Realize that you and others in the districting effort will feel anger, discouragement, and disappointment. This will not be a good time to make decisions. This is why you need to make contingency plans.

### **Finding Alternatives**

The election failure leaves the issues that originally created an interest in districting. You have three options to try again, to try another alternative, or to let the issue rest for a time.

Carry out the following tasks to determine what is the best of these three alternatives:

O1.	Analyze the election campaign and results
O2.	Re-examine districting alternatives based on the analysis
O3.	Proceed with an alternative

### **Task O One: Analyze the Election Campaign and Results**

Analyzing the election campaign and results is an important task. Analyzing a campaign will help you decide upon what action you should take after a failed election. Don't assess blame. Instead use the knowledge that you have now to do things differently next time around. Look at

the precinct-by-precinct report of the election results. Are there areas where the vote was strong? Areas where it was weak? Were there any surprises? Were there areas where you expected strong support, but didn't see that materialize? Was there strong opposition in some parts of the proposed district? Try to understand the reasons behind the answers you receive.

As a group talk about the election. Here are some general questions you can ask yourself:

- Were there turning points in the election process - events that had a negative effect on the outcome? Could those events have been avoided and how?
- If the election was very close, what effect might another election have? Can you change the situation enough to make a difference in the outcome? Would another election soon after this election cause a backlash among voters?

### **Task O Two: Re-examine Alternatives**

Re-examine all the alternatives after considering the election results.

- If the election was extremely close and it appears that corrective measures could change the results, you may want to try again.
- If the districting measure was strongly opposed in one geographic area, but supported in others, redraw the district lines. This may create a district where there is support.
- If the election results were overwhelmingly opposed to the district, you may want to wait.

### **Task O Three: Proceeding**

Proceed with a new course of action once you have analyzed the campaign and results. Disband the group if you choose to wait until later.

If you want to try another election, return to the Planning Phase. Make the necessary changes to the dates and procedures to be used. Think about how to market the proposal and make it acceptable to the electorate. Pay attention to the arguments opponents made against the district and take corrective action.

If a change in library district boundaries is chosen, return to the Assessment Phase and re-examine the issues that have been raised. Review the first attempt at districting and make necessary modifications to the new proposed district.

## Chapter 6: Success Phase

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Overview/Tasks

Task S One: Celebrate

Task S Two: Monitor the County Commissioners and the City Council

Task S Three: Carry Out Your Long-Range Plan

Task S Four: Publicize the Changes

### Success Phase Overview/Tasks

If your election passes and a new district is created, there are lots of things that must be accomplished:

S1.	Celebrate your accomplishment! Say thank you to all who supported the effort.
S2.	Monitor the county commissioners' (and in some cases the city council's) actions that are required to create or expand the district.
S3.	Carry out your new service plan.
S4.	Publicize the changes that are occurring.

#### Task S One: Celebrate

Take some time to savor success. Throw a party because you have worked hard at providing excellent library service for your community. Thank those who helped, including the county commissioners.

#### Task S Two: Monitor the County Commissioners and the City Council

Local officials have certain activities that they are required by law to carry out if the election is successful. After the results have been canvassed, the county commissioners must certify that the district is formed within 10 days.

Within 30 days after the certification, the county commissioners of each county within the district must jointly appoint the initial members of the district's library board. Refer to MCA 22-1-704.

#### Task S Three: Carry Out Your Long-Range Plan

Begin working on the activities you planned. Make any needed changes in personnel structure, policies, and initiating new services. The more planning that was completed in the planning phase, the easier this will be.



## **Task S Four: Publicize the Changes**

Publicize the positive changes you have made in the new library district. Here are some ideas:

- Send press releases to all media outlets when you begin or expand a service.
- Ask the local paper to do an in-depth article on the changes after the changes have been made. Suggest they write the article from the patron's perspective.
- Suggest a story to the local television station's news director if there is a channel close to your area.
- Create and distribute a nicely printed annual report for the district after its first year of operation, showing new services and how well they have been used.
- Volunteer to provide speakers for local service club meetings to talk about new library services.
- Be creative!

# Appendix

## Sample map of a library district

### North Lake County Public Library District

