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A Superintendent's Guide to a Successful Bond Proposal

Scott D. Mollenberndt

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A SUPERINTENDENT'S GUIDE TO A SUCCESSFUL BOND PROPOSAL

by

Scott D. Moellenberndt

A Project Report
Submitted to the
Faculty of The Graduate College
in partial fulfillment of the requirements
for the Degree of Specialist in Education
Department of Teaching, Learning and Leadership

Western Michigan University
Kalamazoo, Michigan
December 2004
A SUPERINTENDENT’S GUIDE TO A SUCCESSFUL BOND PROPOSAL

Scott D. Moellenberndt, Ed.S.
Western Michigan University, 2004

For most school districts it has become increasingly difficult to gain voter support for bond referendums. In addition, there is little information available for the superintendent and board of education to reference when considering a bond campaign in their community.

In response to these concerns, "A Superintendent’s Guide to a Successful Bond Proposal" was developed to provide campaign strategies, timelines and a sequential list of events for the superintendent to consider. Examples of campaign strategies employed by the Edwardsburg Public Schools, Edwardsburg, Michigan during their successful bond referendum are included as appendices throughout the guidebook.

Through this research, seven essential steps have emerged to ensure success during a school bond campaign. Although each of these steps are explored, the extent to which each step is utilized will vary by community.
ACKNOWLEDGEMENTS

Thank you to the many individuals, named and unnamed, who through their support contributed to this project. Although it may have taken awhile to complete this manuscript, I enjoyed the process and made some very special friends along the way.

Mr. Sherman L. Ostrander, Superintendent of Edwardsburg Public Schools. My friend and mentor for the past thirteen years, whom I have observed orchestrating successful bond initiatives.

The Blue Ribbon staff at Edwardsburg Intermediate School, with special thanks to my secretaries, Mrs. Jill Anderson and Mrs. Amy Higley.

My friend and MAMSE colleague, Dr. Daniel Reattoir, Superintendent of Sault Area Public Schools, for sharing his insight in this project.

Dr. Gary Wegenke, my graduate advisor and Dean of the College of Education at Western Michigan University, for his patience, professionalism, and guidance throughout this process.

The four women in my life, my wife Lori and daughters Lindsay, Melissa, and Emily, for their love and unwavering support.

Scott D. Moellenberndt
PRESENTLY, there is very little information including published resources, available for school districts to reference when considering a bond campaign. This manual provides a sequential list of events, along with several bond campaign strategies that a public school superintendent and board of education within the State of Michigan may find helpful when preparing for a bond referendum in their community. The guidebook will provide you with a sequential listing of events that will help you understand what steps should be taken when and why they should be followed. You will also find a multitude of campaign suggestions, ideas, and techniques. Within the guidebook strategies used by the Edwardsburg Public School District, Edwardsburg, Michigan, during their successful bond campaign is listed as appendices throughout.

Each community and its school system have different educational issues needing to be addressed. Select those ideas expressed in the guidebook that are best suited for you and your community. Although no two school bond elections are identical, they have in common the fact they are all political campaigns. However, there are basic parameters, questions, and techniques that can be utilized in most every bond election. These principles are the same for large cities or small towns, as well as for large bond referendums or smaller ones.
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CHAPTER 1

INTRODUCTION

Since the passage of Proposal A in March 1994, public school funding within the State of Michigan has relied upon a two-cent sales tax increase and property owners paying school support mills to the state government in Lansing. The state then distributes the money to school districts in the form of a per pupil payment. The funding ranges from $6,700 to $11,000 per student and is intended to cover the school district’s operating expenses.

Many taxpayers are dismayed to learn that additional monies are needed for facility improvements and new construction is not included in the school district’s operation expenses. Michigan is one of only eight states that provide no grant support to local school districts for capital projects. As a result, local districts must rely entirely upon local property taxes to generate additional funding for building projects. Therefore, school districts must convince their local constituents of facility needs and the importance of approving a proposal to increase their local property taxes in the form of a bond issue. Michigan, as in most other states, requires a simple majority vote by the district's registered voters to approve a school bond referendum. However, states such as California and Idaho need as high as a two-thirds majority to approve bond measures.

Today, a bond referendum usually requires a well-organized effort from parents, educators and civic and business leaders to yield positive results on Election Day. Even
though Proposal A has worked to reduce the disparity of per pupil funding for operating expenses, it remains much easier for property rich school districts to renovate or construct new educational facilities for their children. Since the properties in these areas have a higher taxable value they can maintain a lower tax rate and debt ratio than in property poor districts that are limited in the facilities they can afford. Poorer districts must levy higher property taxes and assume considerably higher debt to pay for them.

For most school districts it has become increasingly difficult in recent years to gain support for bond referendums. According to the 2000 census, both men and women are postponing marriage and delaying parenthood (Conrod, 2002). Families today have fewer children. The percentage of households in the United States that have no children of school age is increasing. Also, the post-war baby boomer generation is beginning to retire. This means there are more households who have little affiliation with their local schools. As a result it is more difficult to reach these voters and to interest them in the condition of their community schools.

Taxes have increased dramatically in the past several decades. Demand for tax relief grows stronger every day. Many retirees are living on fixed or reduced incomes. A school bond election is one of the few instances when the people have a direct choice whether to raise their own taxes. During difficult financial times many people become incensed when asked for a tax increase. Voters often use an election to express their feelings on how schools should be run. The children's need for a safe, healthy, computer aided learning environment sometimes takes a back seat to personal or political issues.

Nevertheless, new and stricter laws now govern health, safety, and handicapped
accessibility in schools. The infusion of modern teaching aids, methods, and equipment has increased the need to upgrade outdated facilities. To manage the growing school population some districts have resorted to split sessions, year-round school, and Saturday school. These stop-gap measures place additional stress on staff, students, parents, and buildings. The longer capital improvements are postponed, the more expensive they become. The bottom line is that it has become harder to convince the voters to approve school bonds. As more schools are in need of improvement nearly every community will be required to build, expand or upgrade schools, or consider consolidating with nearby towns. In Michigan the only means of funding these kinds of improvements is by encouraging local taxpayers to approve a school bond referendum.
Table 1

What a New School Costs (Boschee & Holt, 1999).

<table>
<thead>
<tr>
<th></th>
<th>Elementary School</th>
<th>Middle School</th>
<th>High School</th>
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<tbody>
<tr>
<td>Cost/Square Foot</td>
<td>$110.57</td>
<td>$108.59</td>
<td>$109.09</td>
</tr>
<tr>
<td>Cost/Student</td>
<td>$12,667</td>
<td>$15,143</td>
<td>$18,885</td>
</tr>
<tr>
<td>Square Feet/Student</td>
<td>114</td>
<td>150</td>
<td>160</td>
</tr>
<tr>
<td>Average No. Pupils</td>
<td>600</td>
<td>800</td>
<td>900</td>
</tr>
<tr>
<td>Average Size (sq. ft.)</td>
<td>60,000</td>
<td>114,000</td>
<td>133,500</td>
</tr>
<tr>
<td>No. Classrooms</td>
<td>26</td>
<td>38</td>
<td>35</td>
</tr>
<tr>
<td>Total Cost</td>
<td>$7,112,917</td>
<td>$12,228,198</td>
<td>$16,031,336</td>
</tr>
</tbody>
</table>

CHAPTER 2

MICHIGAN CAMPAIGN FINANCE ACT

In order to conduct a successful bond campaign, education leaders need to familiarize themselves with campaign laws of their state to avoid legal difficulties.

The State of Michigan provides legal guidance to persons and organizations conducting an election through Act 388 of 1976 or what is commonly known as the Michigan Campaign Finance Act. This legislation became law in 1976 and has been revised or amended numerous times. Michigan school districts are governed primarily by section 169.257 of the act, commonly referred to as § 57 (Appendix A).

In summary, Section 57 defines who can do what during an election campaign. It states that school employees cannot utilize public funds, time during their workday, school equipment, or any other resources funded by the public intended for school operations. If a message advocates a position, it must be paid for with private funds or expressed during an employee’s personal time. However, factual information and meetings may be funded by the school district (Appendix B). For example, a document describing the fact that students do not have access to computer technology due to the school’s current electrical system capabilities is appropriate. Nevertheless, be careful that the distribution of factual information is not interpreted as an attempt to impact the passage of a bond issue.

Section 57 also allows districts to provide factual information through debates,
newspapers, publications, or regular media broadcasts. This allows school personnel to participate in interviews if the activity is part of the medias’ normal activities. It also condones the use of school facilities as long as other candidates or committees are permitted similar access.

The final exception to the prohibitions of Section 57 allows public employees or appointed persons to volunteer, express his or her views, or spend their own money outside of their established workday. Under this exception, teachers or other staff members can work to promote a bond issue after the school day has ended.

Violations of Section 57 are enforced by the Michigan Secretary of State and are punishable by monetary penalties. Individuals can not be charged more than $1,000.00 or up to one year of imprisonment. An organization found to be in violation could be fined up to $20,000.00 or the amount of the improper expenditure, whichever is greater.

Lastly, campaign committees must file a “Statement of Organization” with the local county clerk within ten days of receiving or spending $500 or more from private sources.
CHAPTER 3

THE THREE ELEMENTS

For the best chance of success, a school bond project must be supported by three elements: the school board, a volunteer citizens' committee, and the people in the community.

The School Board

This elected body alone has the legal authority to determine the size of the bond and the date for the election. The board has the final word on the scope of the improvements and the design of the project. The board usually determines the need for school improvement and then organizes a citizens' committee to support it.

The Citizens' Committee

This group serves as a bridge between the school board and the public. It may start with a specific list of improvements or with only a perception that something needs to be done. The committee explores school needs; creates public awareness, opinions, builds community support for school improvement, and inspires people to vote for the bond. It may be organized by the school board or started by a few determined citizens. According to Conrod (2002), an active citizens' committee greatly increases the chances for a successful school bond.
The People

This group is best known as the community, voters, or taxpayers. These are the very people who will be asked to pay for the proposed school improvements. Many citizens have strong opinions about school needs and how much improvement should cost. Usually their cost estimates are low. The people must be made aware that a problem exists with the current school facilities and how this problem impacts the entire community. They must believe that the proposed solution is the best choice. They need honest information as to what is needed and why they should support it.

The people's input is vital. If they don't believe the project reflects their feelings and opinions, they will not support it. Each of the three elements is crucial. If one element is weak, the bond proposal is more likely to fail. Before an idea will catch on, it must be a logical concept that people are willing to support. Secondly, it must fit the temper of the community. Consider the situation in your community. Is school improvement needed? Do you have a sound proposal to address the needs? Can you affect school improvement without requiring a bond proposal? How about the "temper of the community"? Was a school official recently involved in a major scandal? Has your area suffered a serious flood, poor harvest, or a factory closure resulting in the layoff of many voters? Have taxes risen dramatically within the past year? If so, you may need to wait before initiating a bond issue. Although nothing may stop an idea whose time has come, if the timing is not right, even the best idea will fail. The most common argument against a school bond is, "Taxes are too high already. We can't afford it." This argument alone should not deter you from attempting a school bond proposal.
CHAPTER 4

THE INFORMATION PHASE

During the information phase, the committee establishes open and friendly dialog with school district residents to determine: (1) How the community perceives the current school situation? (2) Do they believe changes are needed? (3) If so, what kind and how much are they willing to spend? This phase is very neutral. The committee probes the public's attitudes but does not express any opinions of its own or suggest a particular course of action. Garnering community input is usually best accomplished by either hosting a community forum or conducting a school facilities survey.

During the information phase the committee opens a line of communication with the school board by attending all board meetings. The committee provides monthly reports to the board forwarding the citizens' feelings and suggestions concerning the school situation. The committee also passes along information from the board to the people. During this phase the committee studies previous bond attempts that have occurred locally and in other communities. If, after the information phase you find the project is not needed or if some temporary obstacle lies between the community and school improvement, put things on hold until the timing appears in your favor. If you have uncovered strong community support for school improvement, you begin.
Conrod (2002), provides a list of events that should begin during the information phase and continue throughout the months leading into a school bond election. On the following page you will find the first monthly checklist to help direct your efforts.

Twelve Months Prior to Election Day

• Call public meeting and collect the names of supporters who attend.
• Organize citizens’ committee.

Eleven Months Prior to Election Day

• Develop questionnaire and survey community.
• Report the results to the community and the school board.
• Begin research of previous school bond attempts.
• Begin focus group meetings
• Begin collecting names of supporters.

Listening to community concerns regarding the school district is the key to success during the information phase and beyond. Generate ideas for future school improvement through open communication with the public. Hosting a community forum or conducting a survey usually works best. Begin formulating a plan to address concerns based upon your findings that demonstrates you have listened to the public.
CHAPTER 5

THE EDUCATION PHASE

Through your evaluations you have discovered major shortcomings in the current school situation. Many people are aware that something must be done, but each person you talk to seems to have a differing opinion on what that something should be. During the education phase the committee's task is to make everyone who will listen aware of the deficiencies the school currently faces and why improvement is needed. Continue “getting the word out” through community forums, newspaper columns, a newsletter, committee web page, and community activities. The committee continues its role as liaison between the public and the school board. This is the consensus-seeking stage. The committee makes no secret of its view that improvement is needed but shows no preference for any particular plan or project. During this phase you are attempting to determine: (1) what school buildings the community feels the district needs; (2) how they believe the present facilities can best be utilized; and (3) which school facilities are of greatest concern to the community. Be careful not to start pushing too soon for a school bond initiative. If you try to sell something to people before they have had a chance to examine it, they will become suspicious of your motives. Until the school board has decided on a particular plan or design, strict neutrality will protect you from charges of having ulterior motives.

Many school districts include their communities in such planning through the use of community forums or focus group meetings. Participation can be by open invitation
through the newspaper or other forms of media, but are usually best attended when individual invitations are sent to leaders in the community. It is important that the community understand their input is valued. Encourage staff members who reside within the community to participate. Often the school district brings in an outside party to lead the discussion during a community forum. The Michigan Association of School Boards provides such services. Use of a neutral party encourages community members to speak openly. The purpose of the forum is to discuss what the community feels is good about the district and what may be necessary to improve it. The information gathered from these meetings is critical in developing an educational plan the public will support.

A building project should be just one part of a school district's educational plan. The superintendent and school board should have a clear and articulated vision of the educational programming they wish to provide students throughout the district. A facilities plan can then be developed from the input received from building administrators, teachers, parents, and community members to best meet the educational program offerings.

During the education phase the school district should consider hiring an independent consulting firm to evaluate the condition of their facilities. An outside consultant is more likely to involve building construction and renovation experts and will provide a more comprehensive and accurate cost estimates than a district self study would. An independent firm is usually perceived as being neutral. This perception will increase community confidence in the cost projections and facility enhancements being proposed.

According to Conrod, (2002) the most common reasons communities decide school improvement initiatives are needed are listed on the following page.
Common Reasons Why School Improvement is Needed

Schools need improvement for many reasons:

- Student population has increased. You need a new or bigger school to relieve overcrowding.
- Student population has declined. It's time to join nearby towns and build a new school to serve them all.
- School facilities are outdated. Classrooms are too small. Electrical wiring is inadequate or dangerous.
- Facilities have become expensive to maintain: old plumbing, poor insulation, leaking roof, inefficient furnace.
- School buildings do not meet health, safety, or access regulations.
- School buildings must be replaced or repaired owing to flood, storm, or fire damage.
- School buildings have simply worn out.
CHAPTER 6

THE CAMPAIGN PHASE

Through your efforts most people are now aware of the concerns related to the condition of current school facilities. You have explored all the issues and informed the community of the various needs and options for school improvement. You have considered and shared possible solutions. You have built a bridge between the community and the school board. Through researching previous school bond attempts you are prepared to counter the arguments of those opposed. More importantly, you have steadily compiled a list of every supporter you can find, and determined if they are registered to vote.

By this time the school board has evaluated the committee and citizen input it has received during the previous months. As a result the school board has proposed a school bond referendum, specified a bond dollar amount and established an election date (Appendix C). Thus begins the campaign phase. Your mission is simple; motivate supporters to go to the polls and vote “yes” for the school bond.

Although you have been planning and preparing for it for months, the campaign phase should last no longer than four to six weeks. If it lasts longer, it becomes difficult to maintain voter interest and provides time for the opposition to organize. If your timing is right momentum from the campaign should peak on “Election Day”.

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Campaign Manager

Even though the campaign phase is the shortest phase during the school bond process, preparing for it must begin months earlier. The superintendent should personally invite someone to lead the campaign drive. Careful selection of a campaign director should occur before the campaign committee is established. The campaign director should be recognized as a community leader who is well regarded. The campaign director will need to make a significant time commitment. Choose someone who is dedicated to the success of the campaign. The position requires a motivator and someone who can delegate responsibilities to others on the committee. The campaign manager must also be hardworking, an effective organizer, and willing to work cooperatively with the superintendent and board of education.

Campaign Subcommittees

In order to ensure a smooth and efficient campaign, it will be helpful to establish at least three campaign subcommittees. These three subcommittees will be assigned to oversee campaign finances, public relations, and activities in each precinct. Each committee should be assigned an individual chairperson. The three chairpersons, along with the campaign manager, comprise the campaign coordinating committee.

The finance committee is responsible for gathering private funds for use during the campaign. Calculate all anticipated campaign expenses to determine a fundraising goal. Solicitations and fundraising activities may vary depending upon the school district’s size and the cost of document printing.
The public relations committee is charged with informing the community. Through the distribution of literature and scheduling speaking engagements, the public relations committee encourages bond supporters to vote “yes” on Election Day.

The precinct committees’ responsibility is to divide the school district into smaller and more manageable neighborhood zones. Elementary school attendance areas are often used for this purpose. The precinct committee also works to establish phone banks though local businesses, as well as train volunteers to call residents.

Members from both the public relations and precinct committees will utilize the telephone to establish a list of “yes” voters through the use of a prepared script (Appendix D). The volunteer callers also make voter registration and Election Day phone calls as reminders.

Action Plan

The campaign committee can organize and implement several types of activities to promote the passage of the bond issue. The type of initiatives you decide on will depend on the size of your community, the amount of money the committee has to spend, and the number of volunteers that have come forward. No matter what campaign activities you decide upon, each activity should encourage open communication and respect within the community.

Although your list of campaign activities may seem overwhelming, if you divide your scheduled events into progressive steps, the campaign will become more manageable. An action plan will help you remain on task (Appendix E). Prepare a detailed list of what

16
has to be done and when. Also determine and who will be assigned to handle each responsibility. Work backward from known deadlines. Estimate how much each activity will cost. The committee cannot depend on the school district to provide any funding for promotional activities since Michigan, as in most states, has laws prohibiting promotional contributions by a government agency. Deadlines should be established for each task, but keep in mind that some tasks are dependent on others. For instance, the cost of printing promotional items cannot begin without having secured sufficient financial contributions. Allow roughly twice as much time as you think will be necessary to complete each task. Be aware that your timeline may vary as dates and deadlines will shift throughout the campaign process.

Commitment Cards

Voter commitment cards are used as a means of having potential "yes" voters put their commitment to vote in writing. The act of filling out the commitment to vote card helps persons to remember to vote. Furthermore, completing a commitment card is simply more meaningful than a verbal commitment. Voter commitment cards can be distributed through campaign committee members as they interact with others in the community. The voter commitment cards are then used to establish the "yes" voter list and can be designed as a postcard and mailed to the voter as reminder before the election (Appendix F).
Determining “Yes” Voters

“Yes” voters can be determined through evaluating a list of registered voters who participated during recent elections. The voters from previous elections are contacted by members of the campaign committee and asked how they intend to vote in the upcoming school bond election. A list of “yes” or “no” voters is then established for use in various campaign activities. Telephone calls or other contacts are utilized to confirm whether the individual is committed to voting on Election Day. This information is also used by poll watchers during the election. As they exit from casting their ballot the names of “yes” voters are checked off. Individuals identified as “no” voters are avoided throughout the campaign process. It is better to spend your energy and resources promoting “yes” voters to participate than attempting to convert “no” voters.

Presentation Teams

Most successful campaigns use presenters to disseminate bond issue information to the community. Presentation teams should be selected by the public relations subcommittee or superintendent. Utilize individuals who speak well and are respected in the community. The presentation team usually consists of community members serving as lead presenters who are accompanied by school administrators to assist with any factual information. The presenters should rehearse in advance and be prepared to address questions or concerns raised by those in attendance. The presentation team should be trained as how they should respond to criticism and negativity about the schools or the bond proposal. Every effort
should be made to provide a consistent message to every community group, club, or service organization that allows them time to present.

Included below are a checklist of campaign events offered by Conrod (2002), that may serve as a reminder during the campaign phase and months leading up to a school bond election.

Eight Months Prior to Election Day

- Produce video or other audio-visual presentation.
- Continue focus group meetings.
- Have publicity subcommittee members produce newsletters, newspaper columns, news releases, and public service announcements.
- Sponsor community events and fund raising activities.
- Work with the school board on needs and design of school improvement.
- Collect names and pledges of support from registered voters and business, civic, and political leaders.
- Design and produce or order campaign tokens, signs, and so on.

One Month Prior to Election Day

- Continue focus group activities.
- Have publicity subcommittee members organize paid advertisements, letters to the editor, photo opportunities with community leaders, and committee-sponsored events.
- Have publicity manager buy newspaper space and schedule endorsements and ads.
• Distribute and display campaign brochure, tokens, posters, yard signs, and so on.
• Make reminder calls and/or send letters to supporters to "get out and vote."
• Canvass voters and tabulate supporters.
• Hold a special voter registration day.

Fundraising

When beginning the fund-raising process, the finance committee should consider obtaining both large and small contributions. Small contributions will come from the sale of campaign buttons, a fund-raising newsletter or from individuals who support the bond issue and are willing to donate $5.00 or $10.00 toward the campaign. Larger donations can usually be secured from individuals and business owners. Contacting businesses that would tend to profit from the bond project should be a priority. The committee must estimate how much money they will need prior to initiating campaign activities, so they can determine how much they will need to generate.

Volunteers

By this time you should have established a sizable list of volunteer help. Volunteers should represent a cross section of the community and be provided a choice of activities in which they are willing to participate. Many people may be willing to help, but will not take the initiative to volunteer without being asked. Have a specific job in mind and be able to describe the task and estimated time needed to complete it. If someone says they would like to help but they are too busy, be prepared to propose a job that can be done in small segments of time. Nearly everyone can find time to address a few postcards or
make a couple of phone calls. For every assignment make sure each volunteer gets detailed instructions, clear guidelines and proper training. Volunteers serve as a representative of the school district and the election committee while in contact the public. People are impressed when someone makes the effort to visit them personally. Positive contacts can greatly benefit your campaign; however, misinformed or ill-prepared volunteers can undo months of hard work. Set a deadline for each task that is to be completed. Be sure that the volunteers feel comfortable doing the work they are assigned. Furthermore, help your volunteers to feel appreciated for their valuable contribution to the campaign.

Teacher and Staff Support

Teachers are sometimes encouraged to keep a low profile during school bond campaigns. Since teachers will benefit directly from a bond they shouldn't be asking the community "to build them a palace." Nevertheless, the campaign will be diminished if the teachers and staff are not actively involved. If the community gets the impression that teachers are not supportive of the bond they will think the teachers don't care. Furthermore, the opposition may claim that since the teachers have no opinion; the current school situation must be fine. Discouraging teachers from showing their support denies the campaign a large group of motivated volunteers. You can't have too many supporters. Every volunteer is viewed as a "yes" vote. Invite teachers and staff to distribute campaign brochures, display yard signs, wear buttons and hang posters. Just make sure that none of these activities occur on school property or during school time. Encourage teachers to participate in the door-to-door canvass. Having a teacher show up at your front door makes a big impact. Ask teachers to write letters to the editor or take out advertisements in the
local paper. It is also appropriate for the school superintendent, administration, and school board members to take part in the canvass, round table discussions or radio and television spots. However, the school board members or superintendent should only be involved if they are popular and widely respected. A controversial school official can do more harm than good to a campaign. Avoid being dragged by the public into personal and other side issues. Concentrate on school facilities improvement, educational needs, and, of course, the children.

Student Participation

Remember to access student support in the campaign. Students are energetic and may be directly affected by the outcome of the school bond election. High school students are especially helpful to stuff envelopes, serve as election runners, or even encouraging eligible classmates to vote. Ask them to recruit other volunteers by bringing a friend to the next meeting. The committee member responsible for the students work must follow up on the students to assure that their assigned tasks are being completed. Student volunteers should be provided a list of committee member names and telephone numbers to contact if problems arise.

Business Support

For the past several months, members of the campaign committee have been visible at local businesses and chamber of commerce meetings. Now it is time to rally their support. Distribute campaign posters by asking all supporting business owners to display the posters in their storefront windows. Ask if their telephones can be used to survey, as well as to encourage voters to come to the polls on Election Day. Provide them with extra
campaign ribbons, buttons, pencils, or balloons to distribute to their customers. In small towns business people may be reluctant to publicly back a school bond issue. They fear their support may lose the business of the school bond’s opponents. Be firm and persuasive in gaining their support. Remind them that a progressive school district is good for the community and also good for business. Those things that benefit children in the community benefit us all.
CHAPTER 7

CAMPAIGN STRATEGIES

The key in getting your campaign message out is to say the same thing in many different ways. Included in this chapter you will find a variety of campaign strategies and how to use them. Don't feel you must use them all. Some strategies may work better in some communities than in others. Select those campaign strategies you feel would be most effective in your community. Also consider the time, cost and number of volunteers each activity will take.

Theme / Slogan

The campaign theme or slogan should be short, catchy, and represent the essence of the school improvement effort. It should be positive and futuristic in nature. Focus on school-aged children and how those in the future will benefit from a new facility. You may also highlight how the people of the community will benefit. Sample campaign slogans include:

- Blue Ribbon Schools for Blue Ribbon Kids
- Kids, Community, Our Future
- A New School- Building for the Future
- Let's "Bond" Together for Our Children's Future
- For the Kids, for the Community
- Our Children's Future Is Now
Like the slogan, the tone of the campaign must be positive, enthusiastic, and confident of it’s’ success. If the committee publicly assumes the bond will pass, the voters will think likewise. Furthermore, a confident winning attitude discourages the opposition from voting. Conversely, each supporter must be convinced that their vote is vital to the success of the bond issue. Every vote counts. Utilize the slogan on all campaign literature and include it in radio and television spots.

The Brochure

School districts have an obligation to inform their constituents about the school bond election. Your goal is to ensure that every voter receives a brochure containing fact-based information before Election Day. The brochure should be simple, easy to read and not prepared as an overly extravagant document. Some voters may be turned off if the document looks too expensive. Include frequently asked questions in your literature and describe the impact that passing the bond will have on students and the community. Brochures can be distributed either by mail or during a door-to-door canvass. Volunteers may also distribute brochures to local businesses and churches.

Endorsements

On every important issue, people look around to see how others feel about it. The endorsements of community leaders have an enormous influence. There are several ways community leaders can help your campaign. When community opinion leaders initiate informal conversation in favor of school improvement initiatives, they may lure many others to the voting booth. Encourage community leaders to host a neighborhood focus
group meeting, during which committee members can establish a list of prominent supporters in attendance. Beginning January 1, 2005, the vast majority of school bond elections within the State of Michigan will be held in conjunction with municipal elections. In these cases it becomes more important to have candidates running for offices endorse the bond. Collecting endorsements from the mayor; city, county, and state representatives; chamber of commerce officers; and prominent business, civic, and religious leaders is critical to any successful campaign. Photo opportunities are most beneficial since they immediately link the supporters to your cause. For maximum impact, encourage radio and television endorsements from prominent supporters or ask them to write a letter to the editor of your local newspaper.

Voter Registration

No matter how much you favor the school referendum, you cannot vote if you are not registered. This little detail can prohibit precious supporters from participating in the election. Promote the use of absentee ballots for those who will be out of town and unable vote on Election Day (Appendix G). Prior to the voter registration deadline call those who have yet to register and provide location information where they may do so. Present them with small campaign items to wear, display or attach to their cars to show support for the bond measure. These individuals are sure to become bond supporters and will remind others to vote as well.
Promotional Items

Promotional items may include door hangers, balloons, bookmarks, pencils, erasers, ribbons, buttons, pencils, giant paper clips, and refrigerator magnets. Print the campaign theme and any additional information that may fit on each item. Campaign ribbons or buttons can be custom-printed or made by hand. A ribbon in the campaign colors tied to a supporter’s car antenna makes an inexpensive statement.

Billboards

Billboards can be expensive, but they provide outstanding exposure. Reserve a location near a busy intersection for the month prior the election. Keep the message bold and simple. You may even consider asking the billboard owner to donate the space as a "sign of their support".

Yard Signs

Yard signs can be expensive if professionally printed. If used, place them in supporters’ front yards or on vacant lots. They should be retrieved immediately following the election. As with all other campaign promotions they should display the committee's logo, color, and slogan. Yard signs that are constructed from a dark colored weatherproof material with contrasting letters are most visible and will last the longest.

Posters

Posters serve as a quick and easy visual reminder for the public to vote. Let your
budget help determine how much you spend on printing costs. Remember to use your campaign colors and include the logo, slogan, and election date. Ask private businesses to display posters in their window and utilize volunteers to staple or tape them to pillars just before the election.

A signature poster can also be very effective in small towns. Signature posters serve as a cross between a roster of supporters and a petition. As citizens sign the signature poster, neighbors and friends can see who supports the bond. As the number of signatures grows, the poster becomes a graphic show of support for school improvement. Creating the signature poster requires the committee to provide sheets of white poster board with a bold black marker attached by a string. On the top of each, write something like, "We Support the November 7th School Bond Election". Display them in the local grocery stores, banks, and throughout the schools in the district. Also, provide a signature poster at each focus group meeting and ask supporters to sign it upon conclusion of each presentation. Collect the posters from the various locations and combine all the signatures onto one large page. This page can then be used as a full page advertisement in the newspaper prior to the election.

Campaign Rally

Is there enough active community support to stage a campaign rally? If so, consider hosting a children’s concert, parade or street theatre. For maximum impact, wait until the final week to ten days before the election to encourage media presence at the campaign rally.
One-On-One Contact Activities

Promotional activities during the last ten days of the campaign should be directed toward those who are either undecided or leaning toward voting "yes". Constituents tend to respond positively to one-on-one contacts and word-of-mouth information. Therefore, both the public relations committee and the precinct committee should plan at least one personal contact activity.

Details for several promotional activities are provided throughout the remainder of this chapter by Boschee & Holt (1999), for the campaign committee to consider. Suggestions for one-on-one activities, media and direct mail campaign activities are included for reference.

Activity: Door to Door Canvassing (Boschee & Holt, 1999)

Purpose

1. To make a personal appeal to individual voters to vote “yes” in the election.

2. To provide information to those citizens who remain uninformed about the bond election.

3. To conduct voter registration and voting information.

4. To establish an estimated number of “yes” votes.

Number of Volunteers Needed

One or two volunteers will be needed for each three-block area assigned.
Tasks

The volunteers walk door-to-door in each neighborhood to leave a promotional brochure or information sheet at the home of each undecided or “yes” voter. To determine whether the resident is in favor of the bond issue, the volunteer simply asks. If they have decided to vote “no,” the canvasser should not engage in debate, but thank them and be on their way. If the occupants are undecided, the volunteer should ask them if they have any specific questions. If so, the volunteer should answer as completely as possible or direct them toward a more knowledgeable source. If they answer in favor of the bond issue, thank them for their support and determine if they are registered to vote and know when the election is. The volunteer may also wish to establish whether the voter may need assistance getting to the polls on Election Day. Be sure to note the name, address, and telephone number of all “yes” voters, so that other volunteers may follow up later.

Timing of Activity

The door-to-door canvas should be conducted before new voter registrations conclude.

Materials

Promotional brochures, information sheets, list of addresses for appropriate marking.
Other Requirements

The volunteers should have a minimum of one hour of training to review interpersonal communication skills and the materials they will be distributing. Volunteers should also be instructed how to record the information they obtain at each household.

Costs

Costs will vary according to the size of the community. Primary costs are for printing the brochure or copies of the information sheet.

Volunteer Commitment

Promotes personal contact with the community and is relatively inexpensive. Also provides reliable data as to the number of “yes” voters. Works well in all communities.

Disadvantages

Requires a large number of volunteers.

Telephone

The telephone is often the most efficient way of encouraging voter support or reminding them to vote prior to a school bond election. Although it requires a large number of volunteers, the results can mean the difference between success and failure. Calling centers should be established at local businesses that offer the use of their telephones after working hours. Having multiple callers in the same location promotes a supportive atmosphere. Callers should be trained and have a prepared script for common questions, hostile responses, or other potential problems. Telephone surveys are often utilized during
the information phase to determine voter sentiment. Campaigns may then be tailored to reflect community opinion. Additional surveys are conducted during the campaign phase to collect and disseminate information (Appendix H).

Your committee may also consider establishing a campaign hot line the week leading up to the election. Promote the hotline through the newspaper, a newsletter, or on radio and television advertisements. The hotline provides an opportunity for community members to ask questions anonymously regarding the bond proposal. Leave no question unanswered. If phone volunteers are unable to answer the callers question have a school administrator or knowledgeable committee member reply promptly.

**Activity: Telephone Canvassing** (Boschee & Holt, 1999)

**Purpose**

1. To gather information about the number of “yes” voters.

2. To disseminate information to any individual uninformed about the election,

3. To provide information about voting on Election Day and determine if they need assistance getting to the polls.

4. Good alternative to door-to-door canvassing.

**Number of Volunteers Needed**

One for every fifty voters.
Tasks

Provide the volunteer with a list of 50-70 registered voters. Cross off the names of those individuals who have indicated they will be voting “no”. The volunteer telephones the remaining individuals on the list to determine if they are in favor of the proposed bond issue. If they say they are going to vote “no,” the volunteer thanks them for their time and wishes them a good day. If they are undecided, the volunteer asks them if they have any questions they could answer. Volunteers can also ask individuals if they received a brochure or information sheet. The volunteer should remind supporters of the election date and also determine if they need assistance getting to the polls. Telephone canvassing should not occur before 9:00 A.M. or after 9:00 P.M.

Timing of Activity

Usually, one week before the election.

Materials

Telephone script, voter registration lists with telephone numbers, and forms to record information needed for follow-up activities.

Other Requirements

Volunteers should receive at least one hour of training on how to conduct canvassing activities and review the script with a partner before beginning.
Volunteers’ Commitment

One hour of training and about five hours of calling time. Calling may be accomplished over a few days. Volunteers must either utilize their own telephone or those provided at a local business.

Costs

Inexpensive way of contacting many voters, provides one-on-one contact, and promotes volunteers with little time available to get involved.

Activity: Focus Groups (Boschee & Holt, 1999)

Purpose

1. To provide information to undecided voters
2. To provide information on voting during the upcoming election
3. To solicit volunteers
4. To promote fund raising.

Number of volunteers needed

This will vary depending upon the willingness and time commitment of those individuals sponsoring the activity.

Tasks

The host for the event invites seven to fifteen friends or acquaintances to a coffee in their home to hear a presentation by a school administrator or member of the public
relations committee about the school bond proposal. The host serves refreshments. The event can be organized formally where the speaker gives a presentation followed by a question/answer period before refreshments, or informally where the speaker talks with each person in attendance over coffee. The host should also provide a location to display informational and promotional materials.

Timing of Activity

Usually four to six weeks prior to the election. If voter registration is an objective, host the focus group before registrations have concluded.

Materials

Promotional brochures, voter registration and volunteer cards are needed.

Volunteer Commitment

The host will most likely spend two hours in preparation, an hour or two during the event, plus clean up time afterward. In some cases, the cost of providing coffee and snacks may present a financial burden to the host, so the committee should offer to provide these.

Costs

The promotional brochures, information sheets, and promotional items are the same as those used in other efforts, so the only additional cost is refreshments.
Advantages

An informal atmosphere encourages participation. The setting allows many people, who would not speak at or even attend a large group meeting, to ask questions or air their views.

Disadvantages

The time commitment need from the host.

Media Contact Activities

The use of both print and electronic media can be critical to the success of any campaign. The following activities may prove beneficial to the public relations committee in utilizing media resources.

Newspapers

Utilize the local paper newspaper the week leading into the election for one last community push. Now is the time to activate the endorsements of community leaders. Advertisements may only be purchased by the school district if they are factual or are inviting the public to attend sessions where factual informational will be shared. Graphics or pictures are most likely to catch a reader's eye. Include photographs of students and prominent supporters. Suggest topics or provide sample letters to the editor for supporters to work from. Even ghostwrite letters if necessary. Send letters to each of the newspapers
subscribed to in the community. Encourage school board members to write a joint letter supporting the bond. All letters to the editor must be signed and should include a return address before the newspaper will print it (Appendix I). Personal advertisements purchased by the superintendent and school administrators are also valuable.

Activity: Newspaper Letters to the Editor (Boschee & Holt, 1999)

Purpose

1. To disseminate information to the community.

2. To provide reasons why people should vote “yes”.

3. To keep the issue in front of the public.

4. To counter viewpoints of the opposition.

Number of Volunteers Needed

Numbers will vary according to the size of the community and the number of newspapers. Volunteers should have some writing ability or the committee should provide proofreading before letters to the editor are sent to the paper for publication.

Tasks

Monitor letters written to the editor of local newspapers. This will be a place for bond opposition views to emerge. Refer any opposing articles to the campaign committee so a response may be authored. Once the board selects a design for the new facilities, the
committee may wish to write a letter praising it for the advantages the new school will provide for students.

Timing of Activity

Letters to the editor should begin appearing in newspapers during the investigation phase and continue through Election Day.

Materials Needed

Access to accurate information and resources is necessary.

Volunteer Commitment

The amount of time each writer devotes will vary. During some campaigns a volunteer will write several letters, while in others only one letter will be needed.

Cost

The cost of postage needed to send letters. In some instances, the committee may wish to provide paper and envelopes.

Advantage

Letters to the editor provide an effective means of addressing opposing viewpoints. Letters are inexpensive and can provide valuable insight for the committee as to which aspects of the proposal are receiving concern.

Disadvantages

Care must be taken to avoid engaging in a paper war with the opposition.
Newspaper Articles

While most newspapers assign reporters to cover educational issues, reporters cannot be expected to know the particulars of your bond proposal. Therefore, provide periodic press releases to ensure the information being printed is accurate and remains before the readers (Appendix J).

Activity: Newspaper Articles (Boschee & Holt, 1999)

Purpose

1. To disseminate information about the proposal and school bond election.

2. To highlight the types of educational activities a new facility would promote.

3. To provide a response to opponents of the bond issue.

Number of Volunteers Needed

This will vary depending upon the number of articles needed.

Tasks

Volunteering for these activities will require participation in various tasks:

1. Notification to reporters of newsworthy events.

2. Sharing bond expertise for interview purposes.

3. Sharing bond expertise to address specific concerns
Timing of Activity

The publication of newspaper articles should continue throughout the campaign as needed.

Materials Needed

None.

Volunteer Commitment

Two hours are necessary for the preparation articles and reporting bond information.

Cost

None.

Advantages

Many people read the newspaper. It provides an inexpensive and non-threatening way of dealing with opposition views.

Disadvantages

The length of a newspaper article is often based upon the space available. Few people may read the newspaper in some areas of the community. Reporter misinterpretation may result from statements being misquoted.
Activity: Newspaper Advertisements (Boschee & Holt, 1999)

Purpose

1. To provide announcements about meetings and special events.
2. To promote voting “yes” during the bond election.

Number of Volunteers

Newspaper advertising should be addressed only by the public relations chairperson.

Tasks

Determine and write the type of newspaper advertisement you wish to appear.

Used primarily to announce meeting times and locations.

Timing of Activity

Only as needed during the campaign phase.

Materials Needed

No specific materials are required. The advertising department of the newspaper is often assigned to help write and design the advertisement.

Volunteer Commitment

Writing a newspaper advertisement is usually accomplished within two hours.
Cost

Advertisement space is sold based upon the length of the article. Prices may vary between newspapers.

Advantages

Newspaper advertisements are a good way to communicate specific information to the community. Many people pay more attention to advertisements than articles.

Disadvantages

Cost is high.

Radio & Television

Electronic media reaches hundreds of people and serves as an outstanding communication tool. Although advertising through radio and television is cost prohibitive for most bond campaigns, some stations do offer some possibilities for free publicity. Many communities have stations that feature local news. District personnel can appear on these programs to provide factual information regarding the election. However, most networks require an objective viewpoint and should be use primarily as an opportunity to disseminate information.

Radio

Radio spots are less expensive than you might expect. A 15 second radio promotion repeated at various times throughout the day can be very beneficial in getting your message
to the public. Radio is also an effective means of utilizing business endorsements. Look for free radio exposure through public service announcements. If possible, schedule members of the campaign committee to participate in talk radio shows. Interviews with a question-and-answer format are best, although avoid those that take telephone calls from its listeners or it may set you up for direct confrontation with the opposition. If you have a radio talk show where call-in opinions are encouraged, call each day leading into the election with different reasons why the community should support the school bond proposal.

Public Service Announcements

Most radio and television stations have a calendar of area events. The public relations committee should begin promoting meeting dates two weeks prior to the event.

Community Talk Shows

Suggest appearances by the superintendent or campaign committee members on community talk shows provided by most stations. Community talk shows are especially important during the education phase as the building referendum is first being announced. Community talk shows provide an opportunity for school officials to explain the proposal in a similar manner as they would during a focus group meeting. Most stations look for items of interest to the general public. Some stations offer point-counterpoint programs which allow both sides of an issue to be presented. However, the person supporting the bond may not be a school employee or board of education representative. Only persons who are accustomed to dealing with opposing views and conflict management should attempt such an endeavor.
Internet websites have also been used successfully to communicate bond information. The computer is an easy way to provide updated information to interested voters who may access it at anytime. School districts often provide a link for bond information to be accessed through their own website. If you have a committee member that is knowledgeable in this area, have them develop a simple web page devoted specifically to the bond referendum. If not, contact your local internet provider. A website is usually not very expensive and well worth the cost for a month or two prior to the election. Remember to advertise the website and e-mail address in all your campaign literature so computer users are able to locate the information you have available.

**Direct Mail Activities**

Some school districts use personal letters to encourage support. Campaign letters are effective as a personal invitation to vote although some may feel their privacy has been violated. Sending a reminder letters or brochures to arrive a day or two before the election is also helpful in getting out the "yes" vote. It reminds people where and when to vote and briefly reiterates the proposal and why they should support it.

For best effect:

- Keep it simple and use a good printer.
- Include your logo or photos of children.
- Sign and personalize the letter as much as possible.
- Hand-written addresses receive more attention than computer generated labels.
• To save time and money stuffing envelopes, use postcards or fold the letter in thirds and address the back.

Check with the post office to determine if the correspondence qualifies as bulk rate mail. Send brochures, letters or postcards only to identified supporters who are registered to vote. The last thing you want to do is encourage opponents to vote. If postage costs are a concern, have canvassers distribute the reminder information the evening before the election.

Activity: Campaign Letter or Postcard (Boschee & Holt, 1999)

Purpose

The public relations committee needs to reach as many voters possible prior to the election. This mailing is a direct appeal to the vote “yes,” and provides reasons for doing so and well as information on where and when to vote.

Number of Volunteers

This number will vary according to the number of constituents in the district and the selected mailing method.

Tasks

The public relations committee will be responsible for designing the brochure and preparing it for printing. Whether you need additional volunteers will depend on whether you need to prepare the mailing as bulk rate. Bulk mailing services may also be used to attach labels and sort the mailings by zip code.
Timing of Activity

Campaign letters should be prepared for mailing at least two weeks prior to the election. If using bulk mail allow additional delivery time.

Cost

Bulk mailings are relatively expensive in that the committee must pay for printing the brochure and the mailing.

Advantages

Mailings reach a large number of people and deliver a clear and consistent message.

Disadvantages

The activity costs more than most other campaign activities and a large number of volunteers are needed to process the mailings.

The campaign phase lasts only four to six weeks. Although it is the shortest phase during the school bond process, the organized effort demonstrated by the committee during this period may ultimately determine your success at the polls. The campaign strategies included within the chapter are provided as a variety of options from which to choose. Select those that align best for your school district and community. It is always better to do a few things well, rather than many things poorly. This is true when considering school bond strategies. Take into consideration those initiatives that may have worked well during previous bond campaigns. In many cases, determining the available resources such as the number of volunteers and the amount of time and money you have available will help direct
your campaign activity options. Regardless of the strategies your committee decides to implement, you do not want the momentum of your campaign to peak too soon. Remember, the public's attention span is relatively short. Steadily crescendo your campaign activities as you get closer to Election Day.
CHAPTER 8

ELECTION DAY

Included throughout this chapter are checklists of activities that according to Swaim (1989), need to be prepared or completed by Election Day. Community volunteers are usually best in fulfilling these campaign activities since school district employees and board of education members' involvement may be limited by certain legal restrictions. The superintendent should correspond with the school attorney to confirm that district campaign activities are in compliance with state law.

Preparations Prior To the Election

The following activities should be organized prior to the election:

- Canvass voters either door-to-door or by telephone.
- Conduct voter registration campaign.
- Complete arrangements for absentee ballots for the ill, elderly, or those who are out-of-town.
- Campaign committee has identified “yes” voters.
- Arrange polling places in the schools if possible.
- Arrange trained election workers.
- Check out equipment to make sure it is working properly.
• Recruit poll watchers for each voting location and provide them a list of registered voters.

• Establish a phone bank with volunteers to staff them for those last minute calls to supporters to remind them to vote.

• Secure volunteer drivers to transport people to the polls.

• Set up volunteer baby-sitting services and publicize these services appropriately.

On Election Day

• Arrange campaign committee coverage at each poll.

• Assign poll watchers at every polling place.

• Supply two sets of voter lists for every poll watcher with the “yes” voters designated.

• Poll watchers check off the “yes” voters as they cast their ballots.

• About two hours before the polls close, provide one set of the voter lists to the phone bank so volunteers may begin calling those who have yet to vote.

• The volunteers each call 15 “yes” voters who have not yet voted to urge their participation. Offer transportation or babysitting if needed.

• Prepare telephone scripts for volunteers in advance to ensure all messages are conveyed accurately.

• The poll watchers complete the second voter list so a complete voting record is compiled at each voting precinct.
• Gather results at election headquarters, with all volunteers working together as they complete their assignments.

• Serve refreshments and encourage camaraderie.

• Have tally sheets ready for those who wish to “keep score” as the counts come in from the precincts.

• Provide a chalkboard so that everyone can watch together as the results are being posted.

• Invite reporters to attend or arrange to communicate with them.

• Have a spokesperson available to answer questions or provide commentary to the news media.

• Throw a party.

After The Election

• The school board and/or administration should share election results with the staff the morning following the vote.

• Remove campaign literature, posters, yard signs or other promotional materials displayed throughout the community.

• Conduct a post-election survey.

• Conduct an informal random sampling of workers and voters. Ask them what they thought of the campaign?

• Compile all of your data on voter turnout.

• Analyze election results and campaign activities by precinct or neighborhood.

• Identify and record your least useful approaches.
• Brainstorm new ideas.

• Pay all debts and file campaign finance form with appropriate government agencies.

• Compile a scrapbook as a complete archival record of the election with all materials possible and appropriate commentary on each: brochures, news releases, bulletins, scripts, slide shows, flyers, newspaper articles.

• Organize materials and store them away carefully so that they can be used in future campaigns.

• Express your appreciation to all volunteers publicly and through a personal note.
CHAPTER 9

SUMMARY AND CONCLUSIONS

Michigan’s system of school funding requires school districts to seek funding for building construction from their local constituents in the form of a bond election. Through this research, seven essential steps have emerged to ensure success in a bond campaign (Reattoir, 2002). The extent to which each of the following steps may be utilized will vary due to local circumstances. Student needs should be the primary emphasis in any bond campaign.

Establish a Communication Policy

Keep the public informed of issues and developments at all times. Providing avenues for two-way communication with the public is always important, but more so when encouraging their support for a bond initiative. Establishing relationships with the media and service organizations in advance will help school administrators communicate their message to the public when the need arises.

Include the Public in Developing the Plan

Involve the public in assessing district facility needs and developing building plans. Also include staff members to ensure everyone involved understands the needs and proposed solutions. The plan should be student centered and designed to meet the educational needs of students throughout the district.
Inform the Public

The superintendent is responsible for educating the public of the school districts needs and also of the plan that has been designed to address these needs. Factual information should be disseminated throughout the district. Develop a simple and attractive brochure. An understanding of the Michigan Campaign Finance Act is important in this regard.

The length of the campaign should be limited to four to six weeks in length in order to maintain momentum and promote an urgency to vote.

Establish a Campaign Committee

The superintendent is employed as the educational leader of the community and must provide leadership during a bond campaign. Nevertheless, one may find it beneficial to develop a campaign committee comprised of community members exhibiting leadership skills and credibility. The superintendent should personally select a trusted and energetic individual to serve as the campaign manager.

The campaign committee will determine the extent of the campaign strategies they plan to utilize in consultation with the superintendent. The campaign strategies selected will depend upon individual district circumstances. Once campaign strategies have been developed, private funds should be solicited to provide the financial support needed.

Conduct a Survey

The best means of determining community opinions is through a survey.
Hiring an outside firm to survey community residents may be funded by the school district, or volunteers can be trained using an established script. Telephone surveys allow voters to speak openly and anonymously. This improves survey reliability and provides the district accurate voter information.

Identify “Yes” Voters

Contacting registered voters from lists obtained at the county clerk office should occur. Surveys, community forums, focus group meetings and door-to-door distribution of voter commitment cards are helpful in identifying and developing a database listing “yes” voters.

Remind the “Yes” Voters to Vote

The primary goal in every bond election is to get the “yes” voters to the polls on Election Day. Reminder postcards are helpful if they arrive no sooner than two days before the election. Election Day telephone calling should be coordinated with poll watcher lists and occur two hours prior to the polls closing.

The campaign strategies listed throughout this guidebook have been utilized in successful school bond campaigns throughout the country. Superintendents’ preparing to promote a bond referendum in their community are encouraged to utilize these campaign recommendations to increase their potential for success on Election Day. Although the steps summarized in this chapter are considered essential, the degree to which the ideas and examples described throughout are implemented may vary based on individual district factors.
Appendix A

Michigan Campaign Finance Act § 57
15.41351. Borrowing; bonds; issuance; purposes; amount limits; duration of indebtedness; exceptions; exclusion of refunding bonds, other bonds, from limitation: bonds subject to Municipal Finance Act; bonds or notes as full faith and credit tax limited obligations or voted and allocated tax levies; additional millage for payment without vote not permitted; ratification of bonds for textbooks purchase; confirmation, issuance. Sec. 1351. (1) A school district may borrow money and issue bonds of the district to defray all or a part of the cost of purchasing, erecting, completing, remodeling, improving, furnishing, refurnishing, equipping, or reequipping school buildings, including library buildings, structures, athletic fields, playgrounds, or other facilities, or parts of or additions to those facilities; acquiring preparing, developing, or improving sites, or parts of or additions to sites, for school buildings. (2) Except as otherwise provided a school district shall not borrow money or issue bonds for a sum that, together with the total outstanding bonded indebtedness of the district, exceeds 5% of the state equalized valuation of the taxable property within the district, unless the proposition of borrowing the money or issuing the bonds is submitted to a vote of the school electors of the district at an annual or special election and approved by the majority of the school electors voting on the question.
Appendix B

The Revised School Code
Sec. 1351. (1) Until May 1, 1994, a school district may borrow money and issue bonds of the district to defray all or a part of the cost of purchasing, erecting, completing, remodeling, improving, furnishing, refurnishing, equipping, or reequipping school buildings, including library buildings, structures, athletic fields, playgrounds, or other facilities, or parts of or additions to those facilities; acquiring, preparing, developing, or improving sites, or parts of or additions to sites, for school buildings, including library buildings, structures, athletic fields, playgrounds, or other facilities; purchasing school buses; participating in the administrative costs of an urban renewal program through which the school district desires to acquire a site or addition to a site for school purposes; refunding all or part of existing bonded indebtedness; or accomplishing a combination of the purposes set forth in this subsection. In addition, until December 31, 1991 a school district may borrow money and issue bonds to defray all or part of the cost of purchasing textbooks.

(2) Except as otherwise provided in this subsection, a school district shall not borrow money or issue bonds for a sum that, together with the total outstanding bonded indebtedness of the district, exceeds 5% of the state equalized valuation of the taxable property within the district, unless the proposition of borrowing the money or issuing the bonds is submitted to a vote of the school electors of the district at an annual or special election and approved by the majority of the school electors voting on the question. Regardless of the amount of outstanding bonded indebtedness of the school district, a vote of the school electors is not necessary in order to issue bonds for a purpose described in section 1274a or to issue bonds under section 11i of the state school aid act of 1979, 1979 PA 94, MCL 388.1611i. For the purposes of this subsection, bonds issued under section 11i of the state school aid act of 1979, 1979 PA 94, MCL 388.1611i, shall not be included in computing the total outstanding bonded indebtedness of a school district.

(3) A school district shall not issue bonds under this part for an amount greater than 15% of the total assessed valuation of the district, except as provided in section 1356. A bond qualified under section 16 of article IX of the state constitution of 1963 and implementing legislation shall not be included for purposes of calculating the 15% limitation. Bonds issued under this part are subject to the revised municipal finance act, 2001 PA 34, MCL 141.2101 to 141.2821, except that bonds issued for a purpose described in section 1274a may be sold at a public or publicly negotiated sale at the time or times, at the price or prices, and at a discount as determined by the board of the school district.

(4) Bonds or notes issued by a school district or intermediate school district under this part or section 442, 629, or 1274a shall be full faith and credit tax limited obligations of the district pledging the general
380.1351a Borrowing money and issuing bonds.

Sec. 1351a. (1) Beginning with bonds issued after May 1, 1994, a school district shall not borrow money and issue bonds of the district under section 1351(1). However, a school district may borrow money and issue bonds of the district to defray all or a part of the cost of purchasing, erecting, completing, remodeling, or equipping or reequipping, except for equipping or reequipping for technology, school buildings, including library buildings, structures, athletic fields, playgrounds, or other facilities, or parts of or additions to those facilities; furnishing or refurnishing new or remodeled school buildings; acquiring, preparing, developing, or improving sites, or parts of or additions to sites, for school buildings, including library buildings, structures, athletic fields, playgrounds, or other facilities; purchasing school buses; acquiring, installing, or equipping or reequipping school buildings for technology; or accomplishing a combination of the purposes set forth in this subsection. Section 1351(2) to (4) applies to bonds issued under this section.

(2) The proceeds of bonds issued under this section or under section 111 of the state school aid act of 1979, 1979 PA 94, MCL 388.1611, shall be used for capital expenditures and to pay costs of bond issuance, and shall not be used for maintenance costs. Except as otherwise provided in this subsection, a school district that issues bonds under this section or under section 111 of the state school aid act of 1979, 1979 PA 94, MCL 388.1611, shall have an independent audit, using generally accepted accounting principles, of its bonding activities under these sections conducted within 120 days after completion of all projects financed by the proceeds of the bonds and shall submit the audit report to the department of treasury. For bonds issued under section 111 of the state school aid act of 1979, 1979 PA 94, MCL 388.1611, the independent audit required under this subsection may be conducted and submitted with the annual report required under the revised municipal finance act, 2001 PA 34, MCL 141.2101 to 141.2821.

(3) A school district shall not borrow money and issue notes or bonds under this section to defray all or part of the costs of any of the following:
   (a) Upgrades to operating system or application software.
   (b) Media, including diskettes, compact discs, video tapes, and disks, unless used for the storage of initial operating system software or customized application software included in the definition of technology under this section.
   (c) Training, consulting, maintenance, service contracts, software upgrades, troubleshooting, or software support.
   (4) A resident of a school district has standing to bring suit against the school district to enforce the provisions of this section in a court having jurisdiction.

(5) As used in this section, "technology" means any of the following:
   (a) Hardware and communication devices that transmit, receive, or compute information for pupil instructional purposes.
   (b) The initial purchase of operating system software or customized application software, or both, accompanying the purchase of hardware and communication devices under subdivision (a).
   (c) The costs of design and installation of the hardware, communication devices, and initial operating system software or customized application software authorized under this subsection.


Popular name: Act 451
380.1352 Borrowing money or issuing bonds; contract for legal representation. [M.S.A. 15.41352]

Sec. 1352. The board of a school district or intermediate school district shall not contract for legal representation by an attorney or law firm in connection with borrowing money and issuing bonds under this act unless the board or intermediate school board does all of the following:

(a) Requests from the attorney or law firm and obtains before entering into the contract disclosure of whether the attorney or law firm also represents the underwriter of the bonds or any other party involved in the bond issue.

(b) If the disclosure under subdivision (a) indicates that the attorney or law firm represents the underwriter or another party involved in the bond issue, consents by majority vote of the board or intermediate school board to entering into the contract notwithstanding the attorney's or law firm's representation of the underwriter or other party as well as the board or intermediate school board.

(c) In its contract with the attorney or law firm, requires the attorney or law firm to submit itemized billings on at least a monthly basis that itemize at least time and services provided and any payments made by the attorney or law firm to third parties in connection with representation of the board or intermediate school board.

 Popular name: Act 451

380.1356 Operating deficit; notes or bonds; determining amount of deficit; resolution; pledge of security; maturity; interest; installments; redemption; valid and binding general obligations; payment; use of proceeds; review and approval of budget.

Sec. 1356. (1) Notwithstanding section 1351, a school district that has an operating or projected operating deficit in excess of $100.00 per membership pupil may borrow and issue its negotiable interest bearing notes or bonds for the purpose of funding the deficit in accordance with this section. This authority is in addition to and not in derogation of any power granted to a school district by any other provision of this act. However, except for the purpose of funding an operating or projected operating deficit resulting from a state tax tribunal order or a court order, a school district shall not initiate the procedures to borrow money or issue notes or bonds under this section after January 1, 1994.

(2) Before a board of a school district issues notes or bonds under this section, the board shall provide by resolution for the submission of the following certified and substantiated information to the department of treasury:

(a) There exists or will exist an operating deficit in the school district in excess of $100.00 per membership pupil.

(b) During or before the fiscal year in which the application is made, the school district has made every available effort to offset the deficit, including submission of a question to the school electors of the district to increase the rate of ad valorem property taxes levied in the school district.

(c) The school district has a plan approved by the school board that outlines actions to be taken to balance future expenditures with anticipated revenues.

(3) The existence of the operating or projected operating deficit and the amount of the operating or projected operating deficit shall be determined by the department of treasury, using normal school accounting practices. If a financial audit is required to arrive at a conclusive determination as to the amount of the deficit, the state treasurer shall charge all necessary expenses for the audit, including per diem and travel expenses, to the school district, and the school district shall make payment to the state treasurer for these expenses. The determination by the department of treasury is final and conclusive as to the existence of an operating or projected operating deficit, the amount of the deficit, and the amount of the deficit per membership pupil.

(4) The notes or bonds may be issued in 1 or more series by resolution adopted by the school board, which resolution in each case shall make reference to the determination of the department of treasury. The amount of a note or bond issued shall not exceed the amount of the operating deficit as shown by the determination.

(5) The school district shall pledge as secondary security for the notes or bonds future state school
aid payments, if any, and other funds of the district legally available as security.

(6) The notes or bonds shall mature serially with annual maturities not more than 10 years from their date and shall bear interest, payable annually or semiannually, at a rate or rates not exceeding a rate determined by the school board in the school district’s borrowing resolution. The first principal installment on the notes or bonds shall be due not more than 18 months from the date of the notes or bonds, and a principal installment on the notes shall not be less than 1/3 of the principal amount of a subsequent principal installment. The notes or bonds may be made subject to redemption before maturity with or without premium in a manner and at times provided in the resolution authorizing the issuance of the notes or bonds.

(7) Notes or bonds issued under this section are valid and binding general obligations of the school district, it being the intent and purpose that the notes or bonds and the interest on the notes or bonds be promptly paid when due from the first money available to the district not pledged for other indebtedness and except to the extent that the use is restricted by the state constitution of 1963 or the laws of the United States.

(8) Except as otherwise provided in this section, bonds and notes issued under this section are subject to the revised municipal finance act, 2001 PA 34, MCL 141.2101 to 141.2821.

(9) The proceeds of the sale of notes authorized under this section, after payment of the costs of issuance of the notes or bonds and interest on the notes or bonds for a period not to exceed 9 months, shall be used solely for the purpose of paying necessary operating expenses of the school district, including the payment of principal of and interest on notes or bonds of the school district issued for operating purposes under this or any other act.

(10) A board of a school district that borrows pursuant to subsections (1) to (9) shall submit its budget for review and approval to the department of education. The department of education shall take necessary steps, subject to the school district’s contracts and statutory obligations, to assure that the expenditures of a school district that receives money under this part shall not exceed revenues on an annual basis and that the school district maintains a balanced budget.


Popular name: Act 451

380.1361 Bonds; election; ballot; surplusage. [M.S.A. 15.41361]

Sec. 1361. (1) School district elections upon the issuance of bonds shall be held and conducted as elections in registration districts in accordance with part 13. Members of the board of education shall not serve on a board of election inspectors.

(2) The question shall be submitted by ballot in substantially the following form:

"Shall

(here state the legal name of the school district)

county/or counties of

not to exceed

and state of Michigan, borrow the sum of dollars ($ )

and issue its bonds therefor, for the purpose of

Yes ( )

No ( )"

(3) Anything contained in the ballot not specified in this section shall be considered surplusage and of no legal effect.


Popular name: Act 451

380.1362 Bonds; issuance; conditions prescribed by school district board.

Sec. 1362. (1) The board of a school district that votes to borrow a sum of money may issue the bonds of the district.
(2) The board shall prescribe all of the following:
(a) The form of the bonds.
(b) The amount of the bonds, which shall not be less than $50.00 each.
(c) The time for payment of the bonds.
(d) The interest rates on the bonds.
(e) The manner in which the president and secretary of the board shall execute the bonds.

Popular name: Act 451

380.1363 School districts subject to revised municipal finance act; handling moneys received to discharge indebtedness.
Sec. 1363. Money raised by taxes or otherwise received by a school district for the purpose of paying and discharging the principal and interest of the indebtedness is subject to the revised municipal finance act, 2001 PA 34, MCL 141.2101 to 141.2821.
Popular name: Act 451

380.1364 Tax for payment of principal and interest. [M.S.A. 15.41364]
Sec. 1364. The board of a school district which borrows money shall impose an annual tax on the taxable property in the district for the purpose of paying the principal borrowed, or a part thereof, and the interest thereon, to be levied and collected as other school taxes are levied and collected.
Popular name: Act 451

380.1371 Debt retirement fund; duties of treasurer. [M.S.A. 15.41371]
Sec. 1371. The treasurer of the board of education shall have custody of money, securities, and other evidences of value belonging or pertaining to the debt retirement fund and shall pay out money of the fund, or transfer the securities or evidences of value therein, only upon the order of a majority of the members elected to and serving on the board, and upon a written order of the president and secretary of the board.
Popular name: Act 451

380.1372 Debt retirement fund; record of moneys; securities, and transactions; reports. [M.S.A. 15.41372]
Sec. 1372. The treasurer of a board of education shall keep a proper record of the moneys and securities on hand in the debt retirement fund and of the transactions relating thereto. The treasurer shall periodically, and when requested by the board, make a complete report concerning the same. The proper officers of the school district shall make reports concerning the transactions relating to the debt retirement fund as may be required by the state board or other authority in connection with the handling of the funds of the school district.
Popular name: Act 451
Appendix C

Call for the Election, Open Forum Schedule, Proposal Information
NOTICE OF SPECIAL ELECTION OF THE ELECTORS OF
EDWARDSBURG PUBLIC SCHOOLS
CASS COUNTY, MICHIGAN
TO BE HELD SEPTEMBER 22, 1998

TO THE ELECTORS OF THE SCHOOL DISTRICT:

Please Take Notice that a special bond election of Edwardsburg Public Schools, Cass County, Michigan, will be held in the school district, on Tuesday, September 22, 1998.

THE POLLS OF ELECTION WILL OPEN AT 7 O'CLOCK IN THE MORNING AND CLOSE AT 8 O'CLOCK IN THE EVENING.

The following proposition will be submitted to the vote of the electors at the special bond election:

**BONDING PROPOSAL**

Shall Edwardsburg Public Schools, Cass County, Michigan, borrow the sum of not to exceed Fifteen Million Nine Hundred Fifty Thousand Dollars ($15,950,000) and issue its general obligation unlimited tax bonds therefor, for the purpose of:

- erecting, furnishing and equipping a new Elementary School;
- erecting, furnishing and equipping additions to the Middle and High schools;
- partially remodeling, refurbishing and re-equipping the Primary Building, Eagle Lake Elementary, Middle School and High School;
- acquiring and installing educational technology improvements; and
- developing and improving sites, playgrounds, outdoor physical education and athletic fields and facilities?

(Pursuant to State law, expenditure of bond proceeds must be audited, and the proceeds cannot be used for repair or maintenance costs, teacher, administrator or employee salaries, or other operating expenses.)

PLEASE TAKE FURTHER NOTICE THAT THE BONDS OF THE SCHOOL DISTRICT, IF APPROVED BY A MAJORITY VOTE OF THE ELECTORS AT THIS ELECTION, WILL BE GENERAL OBLIGATION UNLIMITED TAX BONDS PAYABLE FROM GENERAL AD VALOREM TAXES.

THE VOTING PLACE IS AS FOLLOWS:

**PRECINCT NO. 1**

Voting Place: Board of Education Room in the Chicago Road Elementary School.

All school electors who are registered with the city or township clerk of the city or township in which they reside are eligible to vote at this election.

This Notice is given by order of the Board of Education of Edwardsburg Public Schools, Cass County, Michigan.

PHYLLIS MANNING HOWE
Secretary, Board of Education
EDWARDSBURG PUBLIC SCHOOLS

69410 Section Street • Edwardsburg, MI 49112
(616) 663-3055 • Fax (616) 663-6485

SHERMAN L. OSTRANDER, SUPERINTENDENT

REVISIRED
1/22/98

January 9, 1997

PRESS RELEASE:
Elkhart Truth
South Bend Tribune
Edwardsburg Argus

EDWARDSBURG PUBLIC SCHOOLS SETS OPEN FORUMS FOR BOND PROPOSAL DISCUSSION

Edwardsburg Administrators and Board of Education members have established dates and locations to meet with students, parents and community members to discuss and answer questions concerning the February 17th Bond Proposal. Dates, sites and times for the Open Forums are listed below.

<table>
<thead>
<tr>
<th>Targeted Groups</th>
<th>Date</th>
<th>Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eagle Lake Elementary</td>
<td>Jan. 8</td>
<td>7:00 p.m.</td>
<td>Eagle Lake Elem Cafeteria</td>
</tr>
<tr>
<td>High School</td>
<td>Jan. 12</td>
<td>7:00 p.m.</td>
<td>High School Library</td>
</tr>
<tr>
<td>Middle School</td>
<td>Jan. 14</td>
<td>7:00 p.m.</td>
<td>Middle School Library</td>
</tr>
<tr>
<td>PTO Open Forum</td>
<td>Jan. 15</td>
<td>6:30 p.m.</td>
<td>Chicago Road - Board Room</td>
</tr>
<tr>
<td>Eagle Lake Association</td>
<td>Jan. 15</td>
<td>8:00 p.m.</td>
<td>Dock Restaurant</td>
</tr>
<tr>
<td>Elementary Primary</td>
<td>Jan. 21</td>
<td>7:00 p.m.</td>
<td>Primary Cafeteria</td>
</tr>
<tr>
<td>Community Open Forum</td>
<td>Jan. 26</td>
<td>7:00 p.m.</td>
<td>Chicago Road - Board Room</td>
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<td>Community Open Forum</td>
<td>Jan. 29</td>
<td>7:00 p.m.</td>
<td>Our Lake of Lake Catholic Church</td>
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<tr>
<td>Community Open Forum</td>
<td>Feb. 8</td>
<td>3:00 p.m.</td>
<td>Elzroth Mobile Home Community</td>
</tr>
</tbody>
</table>
Edwardsburg Public Schools

Bond Proposal
Charting the Course for the 21st Century

I) New Elementary for Grades Fourth (4th) and Fifth (5th)

A. New construction including fixed equipment
B. Site development
C. Bond issue adjustments
   • Contingency
   • Arch/engineering/planning/design
   • Equipment
   • Bonding, legal fees, capitalized interest, surveys, builders risk insurance, inspection fees
D. Total estimated cost new elementary $8,366,261
Edwardsburg Public Schools

II) Edwardsburg Primary School

A. Improve classroom storage, and remodel classrooms
B. Remodel bathrooms & add fire alarm to meet ADA requirements
C. Upgrade electrical service, distribution systems, add power outlets
   Add cable trays & conduit for technology/hardware
D. Site development
   • New bus drop-off/pick-up, grading, paving, lighting, drainage
   • New staff/visitor parking and car drop-off/pick-up
E. Bond issuance adjustments
   • Contingency
   • Arch/eng/planning/design
   • Retrofitting/re-equipping
   • Bonding, legal fees & capitalized interest
F. Total estimated cost Edwardsburg Primary $741,238

Edwardsburg Public Schools

III. Eagle Lake Elementary

A. Improve storage, and remodel classrooms
B. Upgrade electrical service, distribution system and power outlets
C. Remodel bathrooms and add new fire alarm to meet ADA requirements
D. Remodel for the expansion of food service
E. Roof replacement
   • Recommended sloped metal roof system
F. Site development
   • Add fifty additional parking spaces/resurface existing area
G. Bond issue adjustments
   • Contingency
   • Arch/eng/planning/design
   • Re-equipping kitchen
   • Bonding, legal fees, capitalized interest
H. Total estimated cost Eagle Lake $1,231,940
Edwardsburg Public Schools

IV. Middle School

A. New construction, three new classrooms and science room
B. New addition to central kitchen
   • Cooler, freezer and storage
   • Loading dock for food service
C. Remodeling
   • Relocate art room
   • Replace drywall @ ramp
   • Upgrade electrical service, distribution system & power outlets &
     ADA fire alarm cable tray/conduit for technology/hardware
   • Reseal exterior masonry
   • New acoustical panels in cafeteria
   • New divider in gymnasium
   • Modify fresh air system and add A/C for interior classrooms

IV. Middle School-continued

D. Site development
   • Loading dock/service drive
   • Improved lighting in the parking area
   • Football and soccer fields for physical education & athletics
   • Remodeling
E. Bond issue adjustments
   • Contingency
   • Arch/eng/planning/design
   • Equipment/re-equipping (classrooms, science rooms, & kitchen)
   • Bonding, legal fees & capitalized interest
F. Total estimated cost Middle School $1,722,233
V. **SHARED FACILITIES (High/Middle School)**

A. New construction
   • Instrumental/vocal & Art classrooms

B. Bond issue adjustments
   • Contingency
   • Arch/eng/planning/design
   • Equipment
   • Bond/legal fees/capitalized interest

C. Total estimated cost shared facilities $1,944,289

VI. **Edwardsburg High School Remodeling**

A. Remodel existing classroom for wrestling/competitive cheer
B. Remodel present art room to accommodate life skills
C. Remodel life skills room to science/lab
   (science equipment is allocated in equipment budget)
D. Remodel student bathrooms, locker rooms, staff restrooms, & add fire alarm to comply with ADA requirements
E. Upgrade electrical service, distribution system, add power outlets, & cable trays for technology/hardware
F. Replace gym/cafeteria roof
G. Provide divider wall in drafting room creating 2 classrooms
VI. Edwardsburg High School Remodeling-continued

H. Site development
- Grading, drainage, asphalt, lighting for student parking and new staff/visitor parking

I. Bond adjustment
- Contingency
- Arch/eng/planning/design
- Re-equipping
- Bonding, legal fees, capitalized interest

J. Total estimated cost Edwardsburg High School $1,537,444

VII. District Service Center

A. Construct a district service center

B. Site development
  • Built to residential code standards

C. Bond issue adjustments
  • Contingency
  • Arch/eng/planning/design
  • Equipment
  • Bond/legal fees & capitalized interest

D. Total estimated cost of service center $596,334
Edwardsburg Public Schools

VIII. Transportation Facilities

A. Bus parking, paving, lighting, drainage, & fencing

B. Bond issue adjustments
   • Contingency
   • Arch/eng/planning/design
   • Bonding, legal fees & capitalized interest

C. Total estimated cost transportation facilities $300,946

Edwardsburg Public Schools

IX. Outdoor Athletic Facilities

A. Modify present stadium to accommodate football and soccer - include drainage, irrigation, relocation of field events, lighting, etc.

B. Convert track to eight (8) lane Broken Back design
   • Include grading, drainage, asphalt base,
   • Synthetic surfacing and fencing

C. Construct new football & soccer practice fields

D. Reconstruct six (6) tennis courts and allow for two additional courts

E. Build new concession stand w/bathroom facilities to meet ADA standards
   • Construction
   • Site development
IX. Outdoor Athletic Facilities-continued

F. Bond issue adjustments
   • Contingency
   • Arch/eng/planning/design
   • Equipment
   • Bonding, legal fees, and capitalized interest

G. Total estimated cost outdoor athletic facilities $870,948

X. Technology

A. Infrastructure
   (Included with new construction & renovation cost)
B. Equipment (voice/video/data)
   - Update servers, computers, printers - all buildings
   - Purchase servers, computers, printers as needed
   - Purchase monitors/video equipment in buildings as needed
   - Purchase hardware necessary to automate elementary libraries
   - Purchase portable labs for upper levels (laptops)
   - Equip a lab for community usage
   - Equip high school/middle school industrial arts area with updated technology
   - Hardware for LAN & WAN as needed
   - Upgrade PA systems
   - Upgrade phone systems $529,667
Edwardsburg Public Schools

XI. Summary

- Total estimated project cost: $17,841,300
- Estimated interest earned: $891,300
  (As per Stauder, Barch & Associates, Inc.)

A. Actual bond issue amount: $16,950,000
B. Tentative date for public vote: February 17, 1998
   - Pending State Department of Treasury approval
   - Approval by Board of Education

XII. Estimate Millage Required

A. Existing debt millage: 1.85 mills
B. Increase in millage to fund bond proposal: 4.80 mills

Edwardsburg Public Schools
A BRIEF OVERVIEW OF PROPOSAL A OF 1994

Since the passage of Proposal A in 1994 the property tax system and terms used are different. One of the most significant changes is the addition of Taxable Value. The historic procedure of State Equalized Value (SEV) times the Millage to compute a tax bill is no longer valid. Today’s tax bill is computed by multiplying Taxable Value (TV) times the millage.

Property that has been continuously owned and not remodeled since the 1994 passage of Proposal A will have a Taxable Value comprised of the 1994 SEV times the past three years Consumer Price Indexes. This Taxable Value must not, now or ever, exceed 1/2 of Market Value and in most cases will be less than 1/2 of the Market Value with this beneficial gap widening year by year.

An individual’s Taxable Value may not increase annually by more than 5% or the Consumer Price Index, whichever is less. The exceptions to this limitation being a transfer of ownership or new construction.
## Edwardsburg Public Schools

### Strategic Plan Update

Recommendations Implemented

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<table>
<thead>
<tr>
<th>True Cash Value</th>
<th>SEV @50%</th>
<th>Taxable Value @45.79%</th>
<th>Annual Increase</th>
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<tr>
<td>$ 50,000</td>
<td>$25,000</td>
<td>$22,895</td>
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<td>$ 60,000</td>
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<td>$120,000</td>
<td>$60,000</td>
<td>$54,948</td>
<td>$263.75</td>
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</tbody>
</table>

1. Annual increase is calculated by multiplying Taxable Value x Mills.
2. True Cash Value = Home Market Value = SEV x 2
3. SEV = State Equalized Value = 1/2 of Market Value
4. Taxable Value = 1/2 of Market Value or cumulative total of annual Consumer Price Indexes @ 5% or less (8.43%). Currently properties that have not been remodeled or have not been sold since 1994 have increased a total of 8.43%.
5. Future annual increases in Taxable Value will be limited to the inflation rate (Consumer Price Index) or 5%, whichever is less.
Edwardsburg Public Schools
Strategic Plan Overview

Facilities
Obtained a demographic & feasibility study confirming district facility needs
• Replaced remaining roof sections on Primary
• Replaced Middle School fascia
• Continuing sequential exterior door replacement
• Accepting football bleacher bids in November
• Remodeled 3 science rooms adding a mini computer lab
• Installed irrigation system on baseball field

Technology
• 6 new laptops
• 30 new multi-media computers
• 40 upgrades to computers
• 2 character generator applications
• Partial wiring in two buildings
• Fully wired one building
• 1 new server
• 1 upgraded server
• 2 libraries automated
• Anti-virus applications on all servers
Edwardsburg Public Schools
Strategic Plan Overview

Technology - cont.

• Anti-virus applications on 30 computers
• Microsoft Office installed on all servers
• Transportation automation
• GradeBook program available to all staff
• Internet access in 3 libraries
• NCS (HSPT) application available to all staff
• District data projector
• 150+ hours of in-servicing offered to staff

Increased per student expenditure to $65.00 up from $15.00

Communication

• School-community liaison assignment to Administrative Assistant
• Instituted a “within one business day” return call policy
• Parent-community input provided via Building Advisory Committees
• “Community-Business Appreciation” reception
• District-wide newsletter revamped to provide interactive element
• Direct phone lines to buildings
• Fax machines in all buildings
• Community contact through “Make A Difference” day
• Internet access
Edwardsburg Public Schools
Strategic Plan Overview

Transportation

- Transportation Handbook for all students
- Automated transportation routing "Bustops"
- Enhanced 'sub' driver pay for recent retirees
- Purchased 9 new 78 passenger buses ($540,000)
- Increased to a full-time transportation dispatcher/clerical position
- Re-vamped & added routes in an effort to decrease 'ride time'
- Quality assurance resulting in first time '5-star' excellent safety rating by Michigan State Police
Edwardsburg Public Schools

Edwardsburg Public Schools
BOND PROPOSAL

New Building (46.8%)
Eagle Lake (6.9%)
High School (8.7%)
District service (3.4%)
Athletics (4.8%)
Primary (4.2%)
Middle School (9.7%)
Shared Facilities (10.8%)
Transportation (1.8%)
Technology (2.9%)

New Building $8,366,261
Shared facilities $1,944,289
Middle School $1,722,233
High School $1,537,444
Eagle Lake $1,231,940
Athletics $870,948
Primary $741,238
District Service $596,334
Technology $529,667
Transportation $300,946

Bond Proposal $17,840,300
Less Interest Earned $891,300
Final Amount $16,950,000
HOW MUCH WILL THIS BOND ISSUE COST TAXPAYERS?
(NO ADJUSTMENT IS INCLUDED FOR PROPERTY TAX CREDIT)

THE BOND ISSUE CALLS FOR A 6.75 MIL. INCREASE TO FUND ALL PLANNED PROJECT COSTS FOR BOTH PROPOSALS I AND II. AS SHOWN BELOW, THE TAX ON A HOME WITH A MARKET VALUE OF $60,000 WOULD INCREASE $202.50/YEAR (.00675 MILL FACTOR X 30,000 TAXABLE VALUE).

THE AREA SHADING BLUE PROVIDES AN ESTIMATE FOR THE ACTUAL INCREASE YOU WOULD PAY IN TAXES IF BOTH SCHOOL BOND PROPOSALS PASS.

<table>
<thead>
<tr>
<th>MARKET VALUE</th>
<th>TAXABLE VALUE</th>
<th>YEARLY COSTS</th>
<th>DAILY COSTS</th>
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<tr>
<td>$20,000.00</td>
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<td>$80,000.00</td>
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"Less than a pop a day!"

"M A SENIOR CITIZEN OVER THE AGE OF 65.
HOW MUCH IS IT GOING TO COST ME?
(WITH PROPERTY TAX CREDIT)

YOU MAY QUALIFY FOR A HOMESTEAD PROPERTY TAX CREDIT WHEN PROPERTY TAXES EXCEED 3 1/2% OF GROSS INCOME. THE FOLLOWING CHART CAN BE USED AS A REFERENCE FOR SENIOR CITIZENS WHO ARE 65 YEARS OR OLDER AND ARE CURRENTLY PAYING 36 MILLS IN TAXES (MAXIMUM CREDIT OF $1200).

THE AREA SHADING YELLOW PROVIDES AN ESTIMATE FOR THE INCREASE IN TAXES YOU WOULD PAY IF BOTH SCHOOL BOND PROPOSALS PASS.*

<table>
<thead>
<tr>
<th>MARKET VALUE</th>
<th>ANNUAL HOUSEHOLD INCOME</th>
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<td></td>
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<tr>
<td>80,000</td>
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*Information provided by Charles C. Ross, CPA
### EDWARDSBURG PUBLIC SCHOOLS
#### CURRENT -VS - PROPOSED ELEMENTARY CONFIGURATION

<table>
<thead>
<tr>
<th>Building</th>
<th>Grade Levels</th>
<th>Classroom Size</th>
<th>Enrollment</th>
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</thead>
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<tr>
<td>Primary</td>
<td>Pre K-2</td>
<td>600 square feet</td>
<td>490</td>
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<tr>
<td>Eagle Lake</td>
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<td>512</td>
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<table>
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<tr>
<th>Building</th>
<th>Grade Levels</th>
<th>Classroom Size</th>
<th>Enrollment</th>
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</thead>
<tbody>
<tr>
<td>Primary</td>
<td>Pre K-1</td>
<td>600 square feet</td>
<td>325-350</td>
</tr>
<tr>
<td>Eagle Lake</td>
<td>2 – 3</td>
<td>800 square feet</td>
<td>325-350</td>
</tr>
<tr>
<td>New Building</td>
<td>4 – 5</td>
<td>1100 square feet</td>
<td>325-350</td>
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</tbody>
</table>
Appendix D

Telephone Script
Continue the tradition . . . of excellence in our schools

PRE-ELECTION DAY SCRIPT

Please make calls between the following hours:

Hello, this is ________________, and I am a (parent, teacher, or coach) in Edwardsburg. I have volunteered to call people in our community to remind them to vote in the annual school election. Are you registered to vote? The election is scheduled for Tuesday, February 17, 1998 at Chicago Road school board of education room. The polls will be open from 7:00am until 8:00pm. Please be sure to vote—your vote is important.

INSTRUCTIONS:

1. If you reach a wrong number, make a small 'w' left of the name.
2. If you get no answer, try again later.
3. If you deliver the message, place a check by the name.
4. If you reach an answering machine, leave a message but do not count it as a call completed. Try to call back later.

Have a good time . . . smile with your voice.

If the voter has any questions . . . please have them call the Administration Office at 616-663-1053.
Appendix E

Sample Campaign Timelines
1. Friday, June 19, 1998, deadline for receipt by Thrun, Maatsch and Nordberg of draft Preliminary Qualification Application documents for subsequent hand delivery to the Michigan Department of Treasury.

2. June 22, 1998, 9:00 a.m., meeting with the Michigan Department of Treasury; Brooks Godfrey of Kingscott Associates, project architect; Stauder, BARCH & ASSOCIATES, Inc., as financial consultants; and Thrun, Maatsch and Nordberg to finalize the preliminary qualification application.

3. Meeting of the Board of Education on Wednesday, June 24, 1998 to approve the preliminary qualification application.

4. Week of June 24, 1998, return signed preliminary qualification application to Thrun, Maatsch and Nordberg for subsequent hand delivery to the Department of Treasury.

5. Thrun, Maatsch and Nordberg will request preliminary qualification approval not later than July 29, 1998.

6. Wednesday, July 29, 1998, Board of Education meeting calling the election.

7. County Election Scheduling Committee approval must be obtained IN WRITING by Friday, August 7, 1998. You must furnish Thrun, Maatsch and Nordberg with a copy of this approval.

8. The last day of registration for this election is Monday, August 24, 1998.

9. Absent voter ballots must be available on or before Wednesday, September 2, 1998.

10. The registration notice must be published twice in a newspaper of general circulation in the district. The first publication must be made on or before Thursday, August 13, 1998, and the second publication must be made not earlier than Saturday, August 15, 1998, nor later than Sunday, August 23, 1998.

11. The registration notices must be posted in three of the most public places in the district on or before Thursday, August 13, 1998.

12. The election notice must be published twice in a newspaper of general circulation in the district. The first publication must be made on or before Friday, September 11, 1998, and the second publication must be made not earlier than Sunday, September 13, 1998, nor later than Monday, September 21, 1998.

13. The election notices must be posted in three of the most public and conspicuous places in the district on or before Friday, September 11, 1998.

14. School district offices must be open until 2 p.m. the last Saturday before the election to accommodate application requests for absent voter ballots.

15. The polls of election will open at 7 o'clock in the morning and close at 8 o'clock in the evening on Tuesday, September 22, 1998.

NOTE: Posting of registration and election notices is not a legal requirement. However, because a bonding issue is to be voted upon at this election, it is strongly recommended that notices be posted in the event of a publication error.
TIMELINE OF EVENTS  
(Boschee & Holt, 1999)

Months of February/March - School board, school administration, architect, and fiscal agent determine scope of building improvement program

Day of
March 13   School board passes resolution to call an election.
March 15   Mail letter of invitation to potential committee volunteers for March 21 organizational meeting.
March 16   First publication of Notice of Voter Registration.
March 21   Organizational meeting for sub-committees.
March 23   First publication of Notice of Election. 
           Second publication of Notice of Voter Registration (at least 10 days before deadline).

Week of
March 27   Sub-committees meet on their own to discuss strategies to accomplish stated objectives.
March 30   Second and final publication of Notice of Election (20 days before election).
           Publication of sample ballot.

April 3    Sub-committees begin dissemination informative materials (fact sheets and general information brochure to designated neighborhoods).
April 10   Deadline for voter registration (15 days prior to election).
April 15 and 20   Public information meetings (if necessary).
April 25   School bond election. Board meets to canvas election results.
May 1     Board passes resolution to issue bonds (if market is favorable).
June 1    Closing of issue and reinvestment of proceeds.

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Appendix F

Commitment Card
MAKE YOUR VOTE COUNT FOR KIDS
PLEDGE CARD

Yes, you can count on me to make my vote count for kids.

NAME ____________________________

ADDRESS ____________________________

PHONE NUMBER ____________________________

(CHECK ALL OF THE FOLLOWING THAT APPLY)

___ YOU CAN USE MY NAME AS A SUPPORTER
___ CALL ON ME TO DO VOLUNTEER WORK. I WOULD BE WILLING TO DO THE FOLLOWING:

<table>
<thead>
<tr>
<th>CALLING</th>
<th>WRITING</th>
</tr>
</thead>
<tbody>
<tr>
<td>CANVASSING</td>
<td>SPEAKER'S BUREAU</td>
</tr>
<tr>
<td>OFFICE WORKER</td>
<td>POLL CHECKER</td>
</tr>
<tr>
<td>DRIVER</td>
<td>ANYTHING</td>
</tr>
<tr>
<td>HOST A COFFEE</td>
<td></td>
</tr>
<tr>
<td>OTHER</td>
<td></td>
</tr>
</tbody>
</table>

A Tradition of Educational Excellence
Appendix G

Absentee Voter Application
APPLICATIONS FOR ABSENT VOTER BALLOTS

RE: SPECIAL BOND ELECTION - FEBRUARY 17, 1998
ALL SCHOOL ELECTIONS ARE HELD IN DISTRICT AT CHICAGO ROAD SCHOOL.

Please read the directions on the application very carefully. Your name, reason why you are voting absentee, address where the ballot is to be sent and signature must be complete. (NOTE: Directions on both sides of the application).

PLEASE RETURN APPLICATION TO VOTE ABSENTEE TO:
NANCY C. DAVIS
EDWARDSBURG PUBLIC SCHOOLS
69410 SECTION STREET
EDWARDSBURG, MICHIGAN 49112

BALLOTS WILL BE AVAILABLE ON OR BEFORE WEDNESDAY, JANUARY 28, 1998

Thank you.
Appendix H

Telephone Survey Questionnaire
SURVEY QUESTIONNAIRE
Edwardsburg Public Schools
1998 Bond Issue

Name: ________________________________  Phone Number: ________________________________

Good evening Mr./Mrs./Ms. ________________________________. I am ________________________________ from Andrews University Educational Marketing. We are phoning at random this evening to assess your insights in regards to your upcoming bond issue on February 17, for your school district. Would you be willing to give us a few minutes of your time?

Are you aware of the upcoming bond issue vote for Edwardsburg Public Schools on February 17, 1998?

---

Are your planning to support the bond issue request?

On February 17, the Edwardsburg Public Schools is going for a bond issue to build a new elementary school and other needed district improvements. Are you in favor of your school district upgrading the quality of their educational system?

---

Is there any additional information that would help you with this decision?

Would you like for someone to contact you?

---

What do you consider the primary reason for your opposition on the bond issue?

---

Will you be able to vote on February 17, at the Chicago Road School?

---

You are able to pick up an absentee ballot at Chicago School Road and mail it in if this is more convenient for you.

---

Is there any additional information that would help you with this decision?

---

Would like for someone to contact you?

---
Appendix I

Letters to the Editor
Attorney supports bond issue

To the editor:

I am writing this letter in support of the school millage that will be voted on on Feb. 17, 1998. The passage of this millage is vitally necessary for the continued operation of our school district at a high level of quality.

I left this area of the country about 20 years ago when my wife and I were married. When we returned to the area, with a child on the way, we studied the different school districts in the area before settling on Edwardsburg. The quality of education, as well as the quality of life, offered by Edwardsburg, is well known to all of us who live here. It is also evident in different studies conducted by the state Department of Education.

During the last 8 1/2 years that we have lived here, my wife and I have been proud of how supportive the people in the Edwardsburg school district have been of their school system. It is obvious that we all want excellence in education.

The present millage is in essence a "bare necessity" millage that is needed to operate our schools for the immediate future. The improvements to the existing buildings are needed to keep them functional and should save in the long run on maintenance. We've all witnessed the explosive growth in new housing in the district. The expected growth in student population, prompting the need for new building and modifications to existing ones, is being well planned for by the proposed millage.

As we approach the next century, we should strive to continue to educate our children at the highest possible level. That is the only way we can guarantee a successful future for our children and for ourselves too. Even for those voters who do not have children in the school system, the quality of the school system can and has caused property values to rise for homes within the district. It is my sincere hope that after you review the proposed millage, you will support it because it is best for our children, ourselves, and the future of all of us. Thank you.

Dale E. Blumier
Edwardsburg
Understand the Edwardsburg school proposal and needs

We felt compelled to write this letter to address some of the confusion and misinformation that may have been created by Kenneth R. and Ann Marie Thompson's recent articles regarding the Edwardsburg Bond Proposal.

The 100+ members of the Strategic Planning Committee and the Action Team, including Board of Education members, school administrators, teachers, parents, students, farmers, church leaders, business professionals, police and community leaders completed thousands of hours of visioning and planning for this proposal. The result of this community effort created the 100+ page Strategic Plan, A Five Year Plan, published in December 1996. The comprehensive master plan, combined with the findings and recommendations of the State of Michigan and professional consulting firms, were used by the Administration and the Board of Education to prepare the bond proposal.

The Buildings and Facilities Action Team considered the more costly option for neighborhood schools spread throughout the district as the Thompson's propose. However, the Strategic Planning Committee and the elected School Board members recommended the more cost-effective approach of shared facilities for the arts, music, athletics, technology, and transportation needs of our school program.

No immediate need exists for substantially expanded capacities at the middle and high schools, as Mr. & Mrs. Thompson believe. This finding is supported by the projected growth calculations prepared by the Steering Committee, the Administration, the State of Michigan, and a professional demographic research company. Anyone visiting our Primary and Elementary schools can see the urgent need for the new Elementary School. The creative use of the shared middle and high school facilities will also provide additional educational space available in those buildings for future growth.

Contrary to the Thompson's informal talks with voters about issues, a post-election polling study provided by Andrews University, identified four major concerns of voters not supporting the bond issue: Anti-taxes, Proposal Costs Too Much, Eagle Lake Sewer, Administration Building. The University study did not find concerns with the quality of education and curriculum at Edwardsburg as a factor in the election. The State of Michigan prohibits use of millage funds for curriculum and operating costs. However, the proposal supports many aspects of the quality of our educational program. One example is the modernization and expansion of our computer technologies, as recommended by the Technology Action Team. Another is the addition of classrooms to avoid the "frustrated benefits" of 30+ children in a single classroom.

This community is committed to a comprehensive educational program including academics, music, arts, athletics, vocational and technology skills, transportation, after-school programs, and safety. Michigan voters passed Proposal A in part to eliminate the historical "menuing" vote battles that jeopardized the quality of rural schools by threatening portions of the educational program. The Thompson's proposal to return to this "piece-meal" vote approach could significantly weaken our hard-earned Blue Ribbon Status. Furthermore, depleting the general fund for buildings and expansion, instead of enhancing the quality of our educational program and preparing for tougher times, would be irresponsible.

In September the Board of Education will likely present a revised bond proposal for your careful consideration. We encourage each of you to join the record number of voters supporting this important investment in our children and community.

Jack and Donna Gregory
Citizens for Excellence in Education
The needs are crucial and will not fade away of their own accord. They will only grow more critical over time, and unfortunatly more expensive. To submit the proposal in September, in exactly the same form as it was submitted to the voters in February is projected to cost an additional $725,000 due to rising construction costs and the state of Michigan’s requirement that the district repay all of the legal steps necessary in order to be granted permission to once again place the proposal before voters.

But the proposal will not be presented to voters in its original form. The new Administration Center will be eliminated from the proposal saving $500,000, savings which already been eaten by the cost of resubmitting the proposal. Also removed from the proposal is the new Board Office which was to accommodate more than 150 square feet of open space. The bond money may be used to build the infrastructure to support an additional classroom such as the bookstore and 250 square foot computer lab, the technology coordinator, has been working on for over a year. A conference room and meeting room for the new elementary building was warranted in Edwardsville, with student population growth expected to increase 3 to 5 percent annually.

"This new elementary building will house fourth and fifth graders. It has been designed to be ready for future growth, including additional classrooms to meet the needs of students over the next five years. The formula allows for projected student enrollment multiplied by 1.5 percent. The additional 15 percent allows school districts to plan minimally for growth beyond five years. The state of Michigan has agreed that construction of a new elementary building is warranted in Edwardsville, with student population growth expected to increase 3 to 5 percent annually.

The bond money may be used to build the infrastructure to support an additional classroom such as the bookstore and 250 square foot computer lab, the technology coordinator, has been working on for over a year. A conference room and meeting room for the new elementary building was warranted in Edwardsville, with student population growth expected to increase 3 to 5 percent annually.

The classrooms in the Primary School are only 600 square feet in size. The average class size is 25-30 students. A science lab is included for the classrooms in the second and third grades. The new elementary building will house classrooms of 1100 square feet. The solution then is to make the Primary a school for kindergarten and first graders, Eagle Lake for second and third graders, and the new elementary for fourth and fifth graders. Bigger classrooms for bigger kids. The majority of the multi-age classrooms are "two grade levels and the strategy of "open" classrooms encompasses two grade levels.

The state of Michigan does not fund either the middle school or the high school to be overcrowded. Edwardswil could not legally put forth any proposal to construct a new building for the same reasons. Projected student enrollment is as follows: middle school, 1997-98 500, 1998-99 550, 1999-2000 620 students (the high) and 2008-2009 720. High school, 597 students for 1997-98, 625 students for 1999-98, in five years, 756 students and by 2008-2009, 840.

According to the state of Michigan, the middle school, at 100 percent utilization can accommodate 650 students. At 100 percent utilization, the high school can accommodate 750 students. The number of classrooms required at each school will rise and fall with population peaks, rising in the year 2003 at the middle school and then falling while continuing to rise at the high school (as middle school students move in) until 2009. By placing the additional needed classrooms in the plans, the district will be able to accommodate the middle school and high school, they can be converted from middle school at a later date. The high school use as the community's center. The facility was too high and the final plan had to be prepared down but the original name stuck. This new administration building would have been built to residential codes (the least expensive), and would have contained the community computer lab, the district board room and meeting rooms for tejencies and administrative.

"To allow defeat of this proposal a second time instills that the school district will get significantly less for its money when it finally does pass. A "time is running out" isn't the message the district has. It only is wise to provide but facilities that protect the environment invest in new technology against vandalism, which was experienced recently. Prospects must be made for schools that separate these things from children trying to make their way to the doors. This must be done in a way that is sensitive and includes staff development. Edwardswil would host invitations which would be a more than fair event, but also a house not included, where we would not gut our homes or show our lawns once and expect them to stay that way forever. We all know that our communities require constant upkeep and improvement.

My husband and I have made personal inroads in order for our children the best possible learning environment. We do so because we believe our children should have the best possible learning environment. When our children grow and go on to master life a goad education, we will have nothing years to accomplish this, but I hope our Invest Edwardswil will have been
Message from Edwardsburg voters

On Feb. 17, the bond proposal for the Edwardsburg School District failed by only four votes with a tremendously high turnout of 1,684 voters. In fact, more people voted in Ontwa Township than in the last presidential election.

This letter is a huge “thank you” to the campaign committee for doing such a great job of informing all of the voters — both the yes and no voters.

There is no doubt in my mind that education is a high priority in the Edwardsburg community, but when 844 people say no, a message is being sent to those of us drafting the proposal. It is now up to us members of the school board to work together to hear that message and respond with a plan of action which is in the best interest of our community’s children.

MARY ANN CRETE
Edwardsburg School Board trustee

Negative school votes based on misconceptions

Too bad the voters who turned down the Edwardsburg school bond proposal for a new elementary building and districtwide renovations based their votes on fiction and misconceptions instead of the bottom line — children and their educations.

“They don’t need to borrow money to pay the electric bill.”

Michigan laws do not and never have allowed districts to borrow money for operating costs such as utility bills and salaries.

“They don’t need all those frills.”

“They”, the students of the school district don’t need frills. They do, however, need a warm dry room in which to learn, a bathroom that they can use independently if they happen to be disabled, skills to compete in the 21st century job market. Since when are roofs, wiring and plumbing considered frills? I’m sorry to point out that the one-room school with the privy in back that I attended no longer does the job in our competitive technological society.

“They don’t need all that money for athletics.”

Right. Athletics are NOT a need for every student, but even Socrates promoted “a sound mind in a sound body” and the sound body in our couch potato environment is developed by physical education and athletics. Athletics are a highly important activity to hundreds of Edwardsburg students at all age levels. Athletics teach important life skills such as following directions, working together, quickly devising strategies to solve problems — all skills important in the job market and that are better developed with up-to-date facilities.

“Renters don’t pay their share like property owners.”

Of course they do through their rent which reflects the costs of the rental property including taxes, upkeep and other expenses.

“I can’t afford the tax raise.”

People are willing to pay for that which they find valuable. If a community is to develop, its residents will have to pay the bill. This was not a drastic tax raise, in fact it was very modest — the cost of a can of pop a day, a pack of cigarettes a week, one video a week. Things that aren’t necessities, but that we manage to afford to make our lives more pleasant.

Think about it when the issue comes up again — children are our future. They — if we want to put the issue into purely monetary terms — are the people who will pay my Social Security. I hope they have good jobs and are highly productive citizens because of the outstanding educational facilities they had when they attended the Edwardsburg public schools.

SHIRLEY ANDREWS
Edwardsburg
Edwardsburg still has school needs

Upon entering the Edwardsburg polls last Tuesday for the school bond ballot I immediately had a feeling of defeat, for there before me the room was awash with a sea of gray hair. Call this attitude biased if you will, but I'm willing to bet the senior demographics were unfavorable to this issue. That, coupled with the impending Eagle Lake Sewer District and associated costs, in my mind contributed strongly to the rejection of this bond.

Not only have classrooms begun to swell in size, but anyone that has visited the primary schools recently can surely see the sad condition of the structures. This issue will not fade away; it has to be addressed.

Tuesday's decision has not solved the problem. Oh, I'm sure the school board through pencil sharpening and number crunching will find an alternative more palatable to you naysayers. It will be a compromise, and in the long run we will have to hope that it is not another bubble gum patch that will ultimately end up costing us more money than Tuesday's proposal:

I am no different than many in that I, too, dread increased taxes. However, I've come to realize that "no new taxes" is little more than a vote-winning catch phrase.

We as a community have got to realize this issue is real and going to cost us money, and the sooner it is addressed the more cost effective the solution will be.

When this issue returns on ballot, take the time to visit the schools and then ask yourselves if you truly don't believe our children need new buildings.

If more people will vote with their conscience and not their wallet we can find a solution.

BARRY METCALF
Edwardsburg
Appendix J

Newspaper Articles, Advertisements and Press Release Information
Millage request is likely in 1998 to fund district project

BY DEE BOURDON
Truth Correspondent

EDWARDSBURG — The Edwardsburg High School graduating class of 2010 is now the largest kindergarten class to ever enroll in the local school system and there's still summer enrollments to come.

Increasing enrollment in the school system is crowding classrooms, overloading facilities and straining teacher-pupil ratio. Couple that with routine planning for the future and routine wear and tear of the present facilities and you have a school board with some major decisions to make this summer.

The board met in special session this week with representatives from two companies hired to do a feasibility and architectural study for the district. This was the second time the board met with these consultants.

No vote was taken but it was board members' general consensus there would be a millage request. That request will not come until after the first of the year.

Ted Johnson, Diversified Consultants, Battle Creek, outlined two proposals. Both included construction of a new elementary school behind the present Edwardsburg Primary School for fourth and fifth grades. Discussion here included placing an access road to the new facility.

Brooks Godfrey, Kingscott Associates, Kalamazoo, explained the "ideal project."

It calls for a new elementary, additions and other work to both Edwardsburg Primary and Eagle Lake elementary to extend the building life an additional 30 years, additions to the middle school, a shared middle school/high school facility which would include fine arts classrooms and new auditorium and upgrading and some retrofitting of the present high school to extend its life an additional 30 years.

The plan also calls for tearing down Chicago Road School and building a new administration building, work to the transportation/maintenance building and $1.2 million for outdoor athletic facilities work. "Ideal project" price tag is $35,339,500.

A shortened version would include:

- $8.1 million for a new elementary building
- $748,000 for work done on Edwardsburg Primary
- $792,000 for work on Eagle Lake Elementary
- $2.4 million for work at the middle school
- $2.4 million for a shared facility which would include only fine arts classrooms

WHAT'S NEXT

Edwardsburg Board of Education members set Monday, June 23 for another special work session and a second work session following its organizational meeting on Monday, July 7. During these work sessions board members will look at all construction proposals drawn up by consultants, listen to input from district residents and then make its decision on which of the projects to include in the millage request.

Both Johnson and Godfrey noted construction costs are going up at the rate of about 8 1/2 percent per year and bond rates currently are good.

Patricia Bellaire, financial supervisor, told the board, according to her calculations, a $20 million bond levy would require seven mills. Five mills would generate between $13 and $14 million.

The current debt rate is 1,852.3 mills due to be paid in 2010. This is for payment of the 1993 additions to both elementary and restructuring of the 1969 debt. The 1969 debt levy was for construction of the middle school.

There is a general fund debt obligation for building the new classrooms at the middle school in 1990 but that debt will be paid off in 1999. The general fund obligation is different from the bond levy in the repayment money comes from the general operating funds and not from millage levied on the tax rolls.

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EDWARDSBURG SCHOOLS

Bond issue election set for Feb. 17

New elementary on $16.9 million list of building projects

BY DEE BOURDON
Truth Regional Reporter

EDWARDSBURG — The special school election seeking support of $16,950,000 in bonds is set for Feb. 17.

Ballot language and election date were established Wednesday by the Edwardsburg School Board.

School district voters will be asked to support the sale of $16,950,000 in bonds over a 40 year period to finance, among other things, a new elementary school, additions to the present high school and middle school, remodel all four district schools, construct a new service center and develop and improve playgrounds, outdoor physical education and athletic fields and facilities.

The bond would also pay for development and installation of educational technology improvements.

Superintendent Sherman Ostrander and board president Birdella Holdread estimate the maximum required in millage levy to pay off the bonds could initially be 4.8 mills. And as the district’s State Equalized Value goes up each year and more money is generated at that 4.8 mill level, that figure will be adjusted as is done in all debt millage levies.

The district currently levies 1.85 mills for debt retirement.

Ostrander and Holdread believe that is a conservative figure based on the selling of the bonds at 5.75 percent. The current bond rate for such ventures has been about 5.25 percent and less, Ostrander said.

Informational teas and meetings will be held at various sites in the district between now and Feb. 17, Ostrander said.

For residents not currently registered to vote, the last day to do so to be eligible to vote in this special election is Jan. 20. Absentee ballots will be available by contacting the school office at 663-3055.
School districts struggle with aging facilities

BY AGNES GEIGER
Tribune Staff Writer

When Chris Casey and more than 90 other members of the Dowagiac Central Middle School football team get ready for a big game, they dress in a makeshift locker room in a long, 8-foot wide balcony of the school's gymnasium.

"It's really humid up there, and there's a lot of heat," said 14-year-old Chris. "It's crowded. We can store the necessities, but no extras."

Central Middle School, built in 1926, has a gym with a basketball court smaller than regulation size. Chris, who is also on the basketball team, notices a big difference during away games.

"You get tired easier, because you're not used to running on a big court," he said.

On Central's second floor, instructor Diane Petlick is teaching a computer class. The window is open even on a winter day, as heat from the computers alone increase the room temperature by 10 degrees.

"On any given day, we will have some computers that will not work because of the heat or the electrical wiring," she said. "We've lost power totally on at least two occasions because a student jiggled a plug. It's too difficult to wire the classrooms for optic fiber, and we will never be able to upgrade." 

Principal Ron Walsworth said the school gymnasium doubles as a cafeteria, a small asphalt courtyard is used for recess and the band room has poor acoustics and little room for storage.

"This is a nice facility, but it is old," Walsworth said. "Teachers will come to me and say they want to do this or that with technology. We have five or six classrooms with only 400 square feet, and there isn't the space for a computer or an overhead projector."

In Edwardsburg, the two elementary schools are at capacity. School Superintendent Steve Ostrander sees new housing developments spring up throughout the district and worries he can hire more teachers, but there is no classroom space. Where will they put any additional students?

School districts across Southwest Michigan are beginning to experience similar problems as buildings age and the student population grows. But finding the money to solve these problems can be difficult. School operating budgets do not have the millions it would take to construct major additions or new buildings.

"We have $2.9 million in our fund balance," Ostrander said. "We have a $12 million budget, so the fund balance would only be enough to cover the costs of three months of school."

In Benton Harbor, the district once had a 2-mill tax levy designated for maintenance and repairs.

"We were spending anywhere from $500,000 to $700,000 per year through this levy for roofs, boiler replacement, electrical upgrades and energy retrofitting. That's what kept us going," said Robert Farmer, Benton Harbor Area Schools assistant superintendent for business and technology.

But Proposal A eliminated the ability of the district to levy that millage, he said. Now, the district must take all its maintenance costs out of the general fund.

"We easily have more than $30 million in building needs, and that's without building any new buildings," Farmer said.

School districts must turn to bond issues to find the funds for major improvements, but getting voter approval isn't easy. Of the 153 qualified school bond elections held in Michigan in 1997, only 85, or 56 percent, were successful.

"We easily have more than $30 million in building needs, and that's without building any new buildings," Farmer said.
months, only 25 percent of the proposals were passed by voters.

"We have a big mountain to climb, but I want to beat the odds," said Os-trander during a talk promoting his district's upcoming vote.

Many districts now try to get residents involved developing strategic plans and having an early say in the projects, similar to processes used by Fortune 500 companies.

Several school districts — including Niles and Buchanan — recently conducted major remodeling projects of school buildings financed through bond issues. It's been years since a new school building was constructed in the area, but several districts now think a new building would be more cost-effective than trying to update antiquated facilities.

Dowagiac, Edwardsburg, Benton Harbor and New Buffalo are among school districts that will soon seek multi-million-dollar bond issues for new buildings.

Benton Harbor Schools started a facility study and a bond issue there is at least one year away.

"We would have to look at a new facility," said Benton Harbor Area Schools Superintendent Renee Williams. "Right now we do not have an empty classroom, and then there's the age of the buildings. This is not money for the state-of-the-art or to go to the next level. We're at a point now where we are at a critical situation."

In Dowagiac, plans call for the closing of Central Middle School and the construction of a new high school. The current high school would become the junior high.

If voters approve a $16.95 million bond issue on Feb. 17, Edwardsburg Schools would start construction of a new elementary building and make improvements to other schools. This would shift elementary enrollment from 500 students at the two schools, to about 350 in three school buildings.

In New Buffalo, the board and citizens are working on a design for a building to replace the middle school-high school built in 1930. Preliminary cost estimates place the project at $12.5 million, and voters could decide a bond issue in June.

In school districts where past bond issues have failed, administrators attempt to carry on.

"We've proceeded to work with our financial resources to continue to work on our strategic plan," said Howard Napp, superintendent of Berrien Springs Schools. "We continue to prioritize our building improvements that absolutely can't wait."

Technology improvements, equipment purchases and construction of a track and soccer field complex began this year.

School officials said the quality of the school environment can make a big difference in the education received by the students, and in the morale of the staff.

"At the federal level, the Department of Education has research available that demonstrates facilities and the quality of the facilities do impact achievement, especially..."
DISTRICT MISSION STATEMENT

Edwardsburg Public Schools in partnership with family and the entire community will prepare students for success in the 21st century by providing outstanding and diverse educational opportunities in a safe and caring environment where standards of excellence will not be compromised.

OFFICIAL BALLOT

EDWARDSBURG PUBLIC SCHOOLS
CASS COUNTY, MICHIGAN
SEPTEMBER 22, 1998

BONDING PROPOSAL

Shall Edwardsburg Public Schools, Cass County, Michigan, borrow the sum of not to exceed Fifteen Million Nine Hundred Fifty Thousand Dollars ($15,950,000) and issue a general obligation unlimited tax bond therefor, for the purpose of:

- erecting, furnishing and equipping a new Elementary School;
- erecting, furnishing and equipping additions to the Middle and High Schools;
- partially remodeling, reconditioning and re-equipping the Primary Building, Eagle Lake Elementary, Middle School and High School;
- acquiring and installing educational technology improvements; and
- developing and improving sites, playgrounds, outdoor physical education and athletic fields and facilities?

(Pursuant to State law, expenditure of bond proceeds must be audited, and the proceeds cannot be used for repair or maintenance costs, teacher, administrator or employee salaries, or other operating expenses.)

HOW DID THE BOARD OF EDUCATION DETERMINE DISTRICT NEEDS?

A Strategic Planning Committee was created to study district-wide needs. A cross section of the Edwardsburg school community met with school staff, administration and the Board of Education under the direction of a certified Strategic Planning Facilitator.

- Strategic Planning committee developed belief statements and established district-wide objectives with corresponding strategies.
- Communication, facilities, technology and transportation were determined as areas of priority.
- Action teams involving individuals from the Edwardsburg school community were created to examine each area and to develop solutions with cost benefit analysis.
- The end result was a District-wide 5 year strategic plan which was presented to the Board of Education in December, 1996.
- To further validate the committee's findings and recommendations, consultants were hired to conduct a demographic and feasibility study. Both studies supported the findings of the Strategic Planning Committee.
Specific Building Projects and Projected Costs

New Elementary School
- Will house 4th & 6th Grades
- Designed for a student capacity of 450 Students
- TOTAL COST New Elementary School $8,633,460

Edwardsburg Primary School
- Improved classroom storage which increases instructional area
- Remodel classrooms
- Remodel bathrooms to meet ADA requirements
- Complete phase 1 bus drop off/pick up
- TOTAL COST Edwardsburg Primary $571,122

Eagle Lake Elementary
- Improved classroom storage which increases instructional area
- Remodel classrooms
- Remodel bathrooms to meet ADA requirements
- Expand kitchen preparation/storage area
- TOTAL COST Eagle Lake $792,568

Edwardsburg Middle School
- Four additional classrooms
- Expansion of the central food preparation facility
- Improved lighting of student drop off/pick up area
- Improvement of physical education outdoor facilities
- TOTAL COST Middle School $1,393,523

Middle School/High School shared facilities
- 2 art classrooms
- 1 instrumental music classroom
- 1 vocal music classroom
- 1 multi-purpose classroom
- Five classrooms will become available to the high school
- Above rooms would be utilized by both high school/middle school students
- TOTAL COST Shared facilities $1,823,296

Edwardsburg High School
- Remodel classrooms and improve lighting
- New life skills classroom
- Addition of a new science classroom
- New student parking lot
- Relocation of staff/visitor parking
- TOTAL COST High School $1,312,886

Technology
- Upgrade technology infrastructure
- Update servers, computers, printers - all buildings
- Upgrade monitors/video equipment
- Automate elementary libraries
- TOTAL COST Technology $540,600

Outdoor facilities
- Modify present stadium to accommodate both football and soccer
- Covert track to 8 lane design
- Reconstruct existing tennis court
- Build new concession stand with restrooms meeting ADA standards
- TOTAL COST Outdoor facilities $730,298

Transportation facilities
- Relocate bus parking area
- Improve bus security by adding lighting & fencing to protect vehicles
- TOTAL COST Transportation facilities $217,207

Total Proposal: $16,814,960
less interest earned: (864,960)
Final Amount: $15,950,000

DO ENROLLMENT PROJECTIONS SUPPORT THE PROPOSED FACILITIES RECOMMENDATIONS?
- A demographic study has shown we have grown by 270 students over the past five years and are projected to grow by approximately 175 students in the next five years. We are at full capacity in our elementary schools with a continued student population increase projected for the year 2002-2003.
- Our middle school grade 6, 7, & 8 was at 476 (1997-98) and is projected to be at 539 in five years.
- The high school, grade 9-12, was at 586 (1997-98) and is projected to be at 700 in five years.

HOW MUCH WILL THE BOND COST THE AVERAGE HOMEOWNER?
Proposal A established the taxable value of your home as 45.79% of the home market value. The bond issue calls for a 4.5 mill increase to fund these projects. A mill equals $1.00 of property taxes for each $1,000 of taxable value of your home. This allows us to calculate the yearly increase using the following formula:

\[
\text{Home Value} \times 0.4579 = \text{Taxable Value (as per proposal A)}
\]
\[
\text{Taxable Value} \times 0.0045 (\text{millaie rate}) = \text{Yearly tax increase}
\]

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MAY I QUALIFY FOR ANY PROPERTY TAX BREAKS?
Yes. As a Michigan resident, you may qualify for reimbursement of some or all of your property tax under the state's Homestead Property Tax Credit program. This credit provides the most relief to senior citizens, those on limited or fixed incomes, and those who are blind or disabled. Please discuss the possibility with a qualified tax consultant.

WHEN WOULD THE DISTRICT IMPROVEMENTS BE COMPLETED?
- Many renovations would begin immediately
- The most time-consuming project would be the proposed new elementary school which is projected by architects to be completed in the fall of 2000.

WHEN AND WHERE DO I VOTE?
When: Tuesday, September 22, 1998
Where: Chicago Road School, Board of Education Room
Time: Polls open at 7:00 A.M. and close at 8:00 P.M.

MAY I VOTE ABSENTEE?
Yes. Absentee ballots are available for individuals who plan to be out of town on election day, are disabled, are over 60 years of age. Applications for absentee ballots may be obtained from Mrs. Dew, Superintendent's secretary, in the Chicago Road School. Mrs. Dew can be contacted at 663-1053. If you have filed the application for absentee ballot for this election, the ballot will be mailed to your home.
On Thursday, January 8, television personalities from WNDU-Channel 16 traveled to Edwardsburg to participate in a basketball game to benefit the Jason Zimmerman and Mark Sedlar Scholarship Fund. Over 400 spectators filled the EHS gymnasium to watch the TV personalities compete with the Middle School faculty team. The event generated over $1,600 for the scholarship fund. Many thanks to the fans and participants for their support of this effort!

Eagle Lake Helping Club

Eagle Lake Elementary School's Helping Club students visited the Cass County Medical Care Facility as a community service project. Over twenty students participated in the visit. They brought refreshments to the patients, entertained them with a sing-along and enjoyed visiting with their new friends.

For the Club's next project, the students will take CARE packages, which they have assembled, to the homeless shelter in South Bend. The Helping Club is seeking new ideas for service projects; if you have a suggestion for a project, please call Eagle Lake Principal Rick DeJonge at 616-663-1039.

High School Students Perform Community Service

The EHS Students Against Driving Drunk chapter in conjunction with Elkhart Memorial Hospital collected over 100 toys in a recent Toys for Tots drive. The club is sponsored by teachers Diane Rangel and Michael Marcks.

Student Council members organized a school-wide Thanksgiving food drive collecting 3618 items, 1,000 more than last year's effort. The food was distributed through the Edwardsburg food pantry. The 20 Student Council members also volunteered to work for a day at the Elkhart Women's Shelter.

National Honor Society's 31 members collected over $6,000 from area businesses, organizations and EHS students. The donations allowed each High School student to take an elementary child on a shopping trip to purchase Christmas gifts for family members. 171 individuals were helped by the project. The students were given a 10% discount on their purchases at Meijer, enjoyed lunches donated by Chick-Fil-A in UP Mall and each family received a $25 gift certificate from Harding's Market. The High School students then helped the elementary children wrap their gifts which the High Schoolers delivered to the children's homes.

Special School Election
February 17, 1998
Chicago Rd. School
Polls are open from 7 am – 8 pm
Ballot Proposal Information
See pages 2-4 for details
A Tradition of Educational Excellence

Bond Proposal Highlights

District Mission Statement

Edwardsburg Public Schools in partnership with family and the entire community will prepare students for success in the 21st century by providing outstanding and diverse educational opportunities in a safe and caring environment where standards of excellence will not be compromised.

INSTRUCTION BALLOT

EDWARDSBURG PUBLIC SCHOOLS
CASS COUNTY, MICHIGAN
FEBRUARY 17, 1998

INSTRUCTIONS - To vote in favor of a proposal, place a check mark (✓) in the square to the right of the word "YES"; to vote against a proposal, place a cross (X) or checkmark (✓) in the square to the right of the word "NO".

Before returning the ballot, cut the ballot so that the face of the ballot is not exposed and so that the numbered center is visible.

BONDING PROPOSAL

Shall Edwardsburg Public Schools, Cass County, Michigan, borrow the sum of not to exceed Sixteen Million Nine Hundred Fifty Thousand Dollars ($16,950,000) and issue its general obligation unlimited tax bonds therefor, for the purpose of:

- erecting, furnishing and equipping additions to the middle and high schools;
- erecting, furnishing and equipping a new Elementary School and a district service center;
- partially remodeling, refurbishing and re-equipping the Primary Building, Eagle Lake Elementary, Middle School and High School;
- acquiring and installing educational technology improvements; and
- developing and improving sites, playgrounds, outdoor physical education and athletic fields and facilities?

(Pursuant to State law, expenditure of bond proceeds must be audited, and the proceeds cannot be used for repair or maintenance costs, teacher, administrator or employee salaries, or other operating expenses.)

YES □
NO □

HOW WILL THE BOND PROCEEDS BE USED TO IMPROVE EDUCATION?

DETERMINE DISTRICT NEEDS.

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Bond Proposal Information

Specific Building Projects and Projected Costs

Edwardsburg Primary School
• Improved classroom storage
• Remodel classrooms
• Remodel bathrooms to meet ADA requirements
• New bus drop-off/pickup
• TOTAL COST Edwardsburg Primary $741,238

Eagle Lake School
• Improved classroom storage
• Remodel classrooms
• Remodel bathrooms to meet ADA requirements
• TOTAL COST Eagle Lake $1,231,940

Edwardsburg Middle School
• Three additional classrooms & science laboratory
• Expansion of the central kitchen
• Increased lighting in the visitors' and staff parking area
• Football and soccer fields for physical education & athletics
• TOTAL COST Middle School $1,722,233

Middle School/High School shared facilities
• 2 art classrooms
• 1 instrumental music classroom
• 1 vocal music classroom
• 1 multi-purpose classroom
• TOTAL COST Shared facilities $1,944,289

Edwardsburg High School
• Remodel band room into 2 classrooms
• Remodel life skills room to science lab
• Pave student parking lot
• New staff/visitor parking
• TOTAL COST High School $1,537,444

Edwardsburg technology
• Upgrade technology infrastructure
• Update servers, computers, printers - all buildings
• Purchase servers, computers, printers as needed
• Purchase monitors/video equipment as needed
• Purchase hardware necessary to automate elementary libraries
• TOTAL COST technology $529,667

Edwardsburg outdoor facilities
• Modify present stadium to accommodate both football and soccer
• Convert track to 8 lane design
• Construct new football & soccer practice fields
• Reconstruct 6 tennis courts and allow for 2 additional courts
• Build new concession stand with bathrooms meeting ADA standards
• TOTAL COST outdoor facilities $870,948

Edwardsburg transportation facilities
• Bus parking
• Paving
• Lighting
• Drainage
• Fencing
• TOTAL COST transportation/facilities $300,946

Edwardsburg district service center
• Construct a district service center
• Built to residential code standards
• TOTAL COST service center $596,334

DO ENROLLMENT PROJECTIONS SUPPORT THE PROPOSED FACILITIES RECOMMENDATIONS?
• Diversified Consultants of Battle Creek, Michigan conducted a districtwide demographic study. Their findings clearly support that there will be dramatic increases in school enrollment over the next 5 years due to accelerated residential construction.
• Edwardsburg Primary and Eagle Lake Elementary schools are presently at capacity in student enrollment with continued student population increases projected through 2002-2003.

HOW WILL THE BOND REVENUES BE DISTRIBUTED AMONG THE VARIOUS PROJECTS?

How Much Will The Bond Cost The Average Homeowner

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<td>$45,790</td>
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When Would The District Improvements Be Completed?
• Many renovations would begin immediately
• The most time-consuming project would be the proposed new elementary school which is projected by architects to be completed in the fall of 2000.

When and Where Do I Vote?
When: Tuesday, February 17, 1998
Where: Chicago Road School, Board of Education Room
Time: Polls open at 7:00 A.M. and close at 8:00 P.M.

May I Vote Absentee?
Yes. Absentee ballots are available for individuals who plan to be out of the district on February 17, are disabled, are over 60 years of age. Applications for absentee ballots may be obtained from Ms. Nancy Davis, Superintendent's secretary, in the Chicago Road School or you may call 616-663-1053.

Absentee ballots will be mailed to your home once you have completed the application.
**Bond proposal goes to referendum next week**

By MELISSA BETH WIESE
Vigilant/Argus

EDWARDSBURG — Edwardsburg school district residents have been hearing over the last several months about the need to pass a $16.95 million bond issue to build a new elementary school to alleviate overcrowding.

Passage of the 25-year bond issue would also go towards renovating the two existing elementary buildings and expanding parking, renovating the middle and high schools, with the addition of shared facilities, improving and expanding athletic facilities, including the transportation area and building a new district service center.

Through extensive research, Edwardsburg Public Schools staff and community members worked on a strategic plan and then a proposal to bring school buildings up to the district's reputation.

School officials and citizens have been working hard to spread word through the area by the time polls open Feb. 17.

Public forums and informal talks have been held recently to help educate the public.

The idea to improve the school buildings originally started as a comprehensive plan detailing the district's future over the next five years. Looking at all aspects of how the schools were run, the strategic planning committee said the curriculum was fine. The buildings needed help to allow for the burgeoning population the Edwardsburg district has experienced in the last few years.

The school board has heard the main plan, which was developed through architect proposal and narrowing down the original "Cadillac" plan which addressed all issues in the buildings, estimated to cost over $40 million.

Then the board got to work, parsing the bare necessities and trying to get the amount the district needed to borrow down to five mills or less.

The actual cost of the project is estimated at $17,840,300, while the district is asking for $16.95 million.

The schools will sell the bond, meanwhile earning interest, and putting it back into the project.

"What a lot of districts will do is use the interest to do additional programs," Ostrander said.

This way, taxpayers are paying less in the end for the 25-year bond.

The property value of the home goes up because of the quality of the schools, and without the bond passing, the quality of the schools is likely to decrease.

"In all the taxes you pay, where do you get a better return?" Ostrander asked.

One point mentioned both by bond supporters and detractors is what guarantee is there that the district won't come back in a few years and ask for more money because growth has been more than expected.

In 1991, a small building referendum passed to add on room at some of the schools to allow for growth. Already, those rooms have been decommissioned.

A temporary solution would be to continue to add students to already large classes in the elementary schools, teachers already have classes up to almost 30. The district could hire another teacher, but there aren't any rooms for another class.

"You only need to walk into Eagle Lake or the Primary School and ask one of the teachers," Ostrander said.

Ostrander said, but he puts it forth in terms of an investment.

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The property value of the home goes up because of the quality of the schools, and without the bond passing, the quality of the schools is likely to decrease.

"In all the taxes you pay, where do you get a better return?" Ostrander asked.
They’ll tell you there are fewer rooms left.”

The answer to that problem would be to buy portable classrooms, but Ostrander said there are too many negatives to offset the positive aspect of releasing pressure in the school.

First, portable classrooms depreciate in value; a few years down the road, they’re only worth a fraction of the original cost.

Going through each building, the strategic planning committee evaluated the buildings. The primary school was given a “D” for being inadequate for today’s needs. The classrooms only have 650 square feet, and at Eagle Lake, the rooms are 800 square feet.

The solution the district is hoping to pass is to build two new elementary buildings, and put the smallest children in the smallest classrooms, in the primary school.

The elementary students will be redistributed, with the primary building housing pre-kindergarten through first grade, Eagle Lake grades two and three, and the new building will have fourth and fifth grades.

This will bring the enrollment down in each building, from a current 490 in the primary building and 512 in Eagle Lake to a projected 325 to 350 in each building after the reconfiguration.

By law, the state will not let the district borrow to build for more than 115 percent of projected growth, so the new school cannot be built as large as the district wants.

Before a bond proposal could be approved by the Michigan Department of Treasury, so the district could bring the matter to vote, a study of projected growth had to be made, and found that the schools were definitely getting to the point where they would have to make the space problem even worse.

An independent study undertaken by the treasury department found the same thing: Edwardsburg was experiencing growth.

Other improvements under the proposal include adding new practice fields for soccer and football, changing the track to a broken-back layout, which makes the football field useable as a regulation soccer field. Bathrooms and concession stands are outdated.

Transportation, currently behind Chicago Road school, will be moved and fenced off because of a few incidents of vandalism.

A district service center, the only part of the bond that cannot be directly related to student services, makes up only 3.4 percent of the money hoped to be brought in by the bond.

Because Chicago Road School is getting old, the district would like to build another building, this one strictly for administration, which should also cut down construction costs because it can be constructed to residential standards.

Meanwhile, administration will continue in the old building while the new elementary school is being built, and any possible over flow of student population may be sent to Chicago Road, another reason to keep it.

Earlier attempts to demolish Chicago Road failed mostly for sentimental reasons, but also because some people think it still has some life left.

The district is of the opinion that the 1920s building passed its life expectancy.

Board President Della Holdredge said anyone has to do is see the yearly termite problem in the building to see that it either needs some serious remodeling or demolition.

It would take $3 million to bring the building up to code, and if taxpayers want to spend that much more to bring back the school on sentimental value, the district will do that, but not in this bond issue.

Ostrander points out the new high school will also be brought into ADA compliance.

Shared facilities will be built between the high school and middle school, including two art rooms, two band rooms and two multi-purpose rooms.

While connected by a series of doors, the shared facilities will not allow free hallway access between the schools, because parents of sixth graders don’t necessarily want their students to come into contact with seniors.

The high school will also be brought into ADA compliance.

The student parking lot at the high school will also be paved.

Ostrander said the parking lot is probably the only school parking lot in southwestern Michigan that is unpaved, full of mud and potholes.

Staff and visitor parking will also be added in the lawn area in front of the high school.

Why is Edwardsburg experiencing such growth? The district attributes the growth, in part, to the passage of Proposal A, which made it cheaper to live in Michigan than Indiana. Since South Bend and Elkhart are just short drives for many parents, buying a house in Edwardsburg is cheaper.

Ostrander points out other, contiguous districts probably don’t see as much growth because they aren’t known for quality like Edwardsburg is.

Part of the responsibility can also be put on the townships for not allowing subdivisions to come in, which are also on the rise because of Proposal A.

What if the bond proposal doesn’t pass? Are there any other options available to the district? Ostrander said to continue the quality of education Edwardsburg students have been getting, the improvements must be made. He likes to say the bond proposal is plan A, and plan B is bring plan A back to the voters, only because the district has to wait a certain period of time before going back to the referendum, and bond rates are likely to go up during that time.

“It’s never going to be cheaper than now,” Ostrander said.

Polls open at 7 a.m. next Tuesday and close at 8 p.m. at Chicago Road School.
District hopes for remedy to space problems

By AGNES GEIGER
Tribune Staff Writer

EDWARDSBURG — Teachers at Edwardsburg Primary School badly need more space and storage in their small classrooms.

"With young children you need to have room to move around," said Sexton Moyer, a kindergarten teacher. "Children who are 5 years old are not sitting at tables or desks for a majority of the time."

Moyer said a lack of storage space takes away from instructional time in her class of 21 students.

"We might not do easel painting or some other activities as often, because you have to take things down and move things around," she said.

Another teacher said the number of students in the classroom makes it harder to deliver the excellent education that parents expect.

"With crowded classrooms, be-
Another teacher said the number of students in the classroom makes it harder to deliver the excellent education that parents expect.

"With crowded classrooms, because it's all desks, it's hard to reach everybody when they need to be reached," said Maggie Sevison, a first-grade teacher and parent with children in the district.

On Tuesday, Edwardsburg Public School District voters will go to the polls to decide on a $16.9 million bond issue. If approved, the money would be used to build a new elementary school, and make improvements at other school buildings. The proposal would raise taxes by 8 mills initially and the amount will gradually decline over the 25-year length of the bond.

On Tuesday, Edwardsburg Public School District voters will go to the polls to decide on a $16.9 million bond issue. If approved, the money would be used to build a new elementary school, and make improvements at other school buildings. The proposal would raise taxes by 8 mills initially and the amount will gradually decline over the 25-year length of the bond. 

Sherman Ostrander, Edwardsburg Public Schools superintendent, said the bond issue was developed after a strategic planning process similar to ones used by Fortune 500 companies. In all, more than 90 members of the community participated in committees making recommendations on technology, transportation, facilities and communications. More than $40 million in improvements were suggested, and an architect-firm pared the amount down to $16.9 million. Projects in the bond issue come from that strategic plan.

"In my opinion, this is the most well-researched bond proposal in the history of this district," Ostrander said. "It's taken 1½ years of research and study to get to where we are. It's very well thought out." 

Coupled with its strategic planning, the school board hired Diversified Consultant Services of Battle Creek to conduct a demographic study. The study confirmed the area was undergoing explosive housing growth.

**BOND ISSUE PROPOSAL**

Voters in the Edwardsburg Public School District will be asked to approve a $16.95 million bond issue in a special election on Tuesday. Here is what the proposal would be used for:

- New elementary school building for grades 4 and 5: $8,366,261.
- Construction of instrumental, vocal and art classrooms to be shared by high-school and middle-school students: $1,944,289.
- Middle-school improvements of science room, addition to central kitchen, various remodeling projects, improved lighting in parking lot, football and soccer fields for physical education and athletics: $1,722,233.
- High-school remodeling of classrooms for wrestling and competitive cheerleading, science lab, student bathrooms, locker rooms, replace gynmasium roof, upgrade electrical systems, and grading, drainage and paving of parking lot: $1,537,444.
- Eagle Lake remodeling of classrooms, bathrooms, electrical service upgrading, food service expansion and roof replacement: $1,231,940.
- Outdoor athletic facility improvements, including modifications to present stadium, conversion to eight-lane track, new football and soccer practice fields, reconstruction of six tennis courts, and building of new concession stands: $870,948.
- Primary school remodeling of classrooms, storage improvements, remodeling of bathrooms, upgrading of electrical service, and parking/drop-off area improvements: $741,238.
- Technology improvements in infrastructure and equipment: $529,667.
- Bus parking, paving, lighting, drainage and fencing: $300,946.

See BOND/Page C2
Record turnout for bond vote

By AGNES GEIGER
Tribune Staff Writer

EDWARDSBURG — Edwardsburg Public School District voters braved the rain, and waited up to 20 minutes in line Tuesday as record numbers turned out to decide the fate of a $16.95 million bond issue for school improvements.

The tally was just beginning at press time, including 66 absentee ballots, 1,698 voters, or 37.7 percent of the school district's 4,500 registered voters cast ballots in the special election by 7 p.m., and a lengthy line stretched outside the polls with the final hour of polling yet to go. Between 5:30 and 6 p.m., people waited up to 20 minutes to vote, school officials said.

"We're very surprised. I don't think we've ever had more than 800 people vote," said Della Holdread, president of the Edwardsburg Board of Education and a 15-year board member. "This is a tremendous turnout."

Holdread said usually about 200-300 people vote in a school election, and she was pleased that so many came out.

"More people will have input, and we will know the true feelings of the community," she said.

As the steady flow of people continued into the polls all day, school officials wondered what the outcome would be and the effect of the large turnout on the result.

"I really don't know what this means," Ostrander said Tuesday afternoon of the high turnout. "Generally, people say the larger the turnout, the more favorable the result, because the 'no' voters always come out. But who knows?"

Money from the plan is designated to build a new $8.37 million elementary school to ease overcrowding, and to make improvements to other school buildings. The proposed projects include new classrooms, remodeling, electrical upgrades, athletic facility improvements and a new district service center.

The proposal would raise property taxes by 4.80 mills in the beginning. The levy would be gradually reduced over the 25-year life of the bond. Property owners with a $100,000 house would have to pay about 60 cents more per day in taxes. A mill is a tenth of a cent.

George and Alice Pabreza went to the polls despite the cold drizzle to cast their votes in favor of the proposal.

"I'm sure they need the space," Mrs. Pabreza said. "We can afford it. We both went to Edwardsburg schools and graduated from here. It is a good school."

"It would be a shame to see it disappear. If it did, it would take a long time to get it back," Mrs. Pabreza added.

But other voters said the district was asking for too much and opposed the plan because of the cost.

"I think our grandkids and great-grandkids need it," Mrs. Slager said. "We have a great-grandson starting kindergarten in the fall, and I want her to have the best facilities."

See VOTE/Page B2
Vote: Record turnout for Edwardsburg bond vote

"With all the school tax I'm paying already, I voted 'no,' " said Harry Wallack. "We haven't paid off the last bond yet."

Wallack said the state already raised the sales tax for schools, is using Lotto funds, and just released a lot more money for schools.

"This community can't afford (to pay) any more money," he said. Voter Steve Hambley also said the bond issue was too expensive.

"Maybe if they were just getting an elementary school, but they are asking for things that are frivolous," he said. "They shouldn't be borrowing money to pay electrical bills."

Voters last approved a bond issue for school improvements in 1993. That plan was expected to provide for enough classroom space for five to seven years.

Ostrander said that even if the $16.95 million bond issue is approved, Edwardsburg Schools must still cope with some crowded elementary classrooms in the near future. Construction of the new building will take at least two years.
EDWARDSBURG — Tuesday’s narrow four-vote defeat of a $16.9 million bond issue for Edwardsburg Public Schools left school officials disappointed but vowing to regroup.

“It’s important not to overreact or gloom and doom it,” said Superintendent Sherman Ostrander. “I’m going to take some time and try to draw up statistical data to tell me what if anything we need to change in the process. Obviously the needs of the district are not changing.”

Voters in the Edwardsburg School District defeated the proposal by a vote of 844-840. A record number of 1,698 or 37.7 percent of the 4,500 registered voters turned out at the polls.

The Cass County Board of Election Canvassers reviewed the poll books and other voting procedures Wednesday afternoon and did not change the result, according to Cass County Clerk Ann Simmons.

“There were seven spoiled ballots, and seven absentee ballots that were not returned,” she said. “The school district received two of those absentee ballots in the mail this morning, but they could not be counted.”

Simmons said a recount can be requested within five days of certification of the election, in this case by Feb. 23. Anyone can make the request, but there is a $10 fee.

Officials planned to use money from the bond issue to build a new elementary school and make improvements at other school buildings.

School board president Della Hall said 104 voters showed up for the final tally inside the Chicago Road School Tuesday night. “I’m pleased with the 840 who said ‘yes,'” she said.

Supporters of the proposal said the school improvements were needed for the education of the children, while opponents thought the issue was too costly.

Ostrander knew of no organized opposition to the bond issue, but he was concerned because a major sewer project for Eagle Lake had been approved the week before the school vote.

“I don’t know from any statistical data, but it’s an assumption based on the calls I received,” he said. “Voters were calling and wondering if they could do both.”

Both projects would create a hefty jump in taxes for at least 600 lakefront property owners. The sewer costs were projected at $11,800 spread over 20 years, and other additional charges and fees. Some estimated all total charges would run $1,000 per year.

The school bond would have cost the owner of a $100,000 home about $220 in taxes at first, gradually declining over the 25-year life of the bond. According to a local Realtor, homes on Eagle Lake are selling for as much as $400,000, placing the proposed annual tax increase for those homeowners at about $800.

Ostrander said the large voter turnout indicated that the district did an excellent job of communicating its needs. He said that at some point, he will ask the board to consider bringing the proposal back before the voters.

“I believed at the start that there are some essential needs in this district, and that has not changed based on the results this evening,” he said. “I still think it was an outstanding proposal and well thought out.”

School officials would not be able to place the same proposal before the voters again for six months. However, an issue could be on the ballot in 90 days if there is a significant monetary change.
Bond proposal fails by four votes

Taylor votes for first time

By MELISSA BETH WIESE
Vigilant/Argus

EDWARDSBURG — It was a close vote, but Edwardsburg schools will not be getting their bond proposal money, at least, not yet.

With a record voter turnout Tuesday, 840 people voted to pass the $16.95 million bond proposal, with 844 against.

About 4,500 people are registered to vote in the school district, and for a non-presidential election, and just voting on one issue, the turnout was better than expected.

There’s no official word as to whether there will be a recount on the close vote.

Superintendent Sherman Ostrander said he’s disappointed, but the real issue is the students, and how they will be affected.

A large amount of the bond proposal money, over $8 million, would have gone into a new elementary school, to alleviate overcrowding in the two existing schools.

As more people come to Edwardsburg for the reputation of having good schools, more kids also come, and there isn’t any more room.

Miss Edwardsburg Ursula Taylor prepares to vote for the first time. (Vigilant/Argus photo by Melissa Beth Wiese)

Class sizes often near 30, and some things have to be held out in the hallways of the school.

Other issues included in the bond was the plan to remodel the existing buildings, and add a shared facility between the middle and high school.

Another aspect included expanding and updating the athletic fields and building a district service center for administration, because the present building, Chicago Road School is old, and remodeling would cost much more than building a new building would.

Perhaps one positive aspect can be found from the vote. the district got the message out about the bond proposal, Ostrander said.

With the help of community members, the district had been working hard on getting the word out about the bond proposal to voters.

“I want to express my thanks to the 840 individuals who supported this, the individuals who supported this and the parents,” he said.

He said he doesn’t know at this point whether the school board will want to pursue the bond again, but said if they did, his recommendation would be to leave the bond proposal the same.

“It’s a good proposal,” Ostrander said. “It’s pared back as it is.”

One voter going into the voting booth knew exactly how she was going to vote, and she was one of the 840 to vote yes.

Not only was Tuesday the first time current Miss Edwardsburg Ursula Taylor voted, it was also her birthday.

She turned 18 on Feb. 17 and it was a unique opportunity for her to exercise her civic duty as her first time at the polls.

She is the daughter of David Taylor and Mary Ann Crete.

"Having grown up in a politically-oriented family, I'm aware of how important voting is," Taylor said. "I'm proud to exercise that right."

Unfortunately, as it stands now, the bond proposal didn't go through.

If it had passed, as a senior, she wouldn't have been in school when the improvements to the schools were made, but she has a younger brother in eighth grade, and it's important to his future.

"I think it's a good thing," Taylor said. "I feel it will benefit many."

The opportunities she had while going to high school she feels others should also have, and said voting was a good way to help give back to the community. Explained to her and her classmates as a generational obligation, she feels that other, younger students should be given the chance to attend quality schools.

In her duties as Miss Edwardsburg and a representative of the community, which is very school-oriented, she said it was important for her to vote.

"It sets a good example," she said.

She has been talking to her friends who were going to be 18 by election day, and encourage them to get out and vote.

Unfortunately, a lot of seniors are...
Board takes look at bond

By NORMA LERNER
Vigilant/Argus

EDWARDSBURG — The Edwardsburg school board scheduled a special meeting on March 18 at 6:30 p.m. to discuss options of the defeated $16.9 million bond issue to build and remodel school buildings, and to discuss the future of the district.

During a regular board meeting last week, Superintendent Sherman Ostrander announced that the Feb. 17 vote broke three records, drawing 1,698 voters to the polls.

"I am proud of that," he said. There were 840 people supporting the bond proposal, which was the largest number of voters. It was also the largest number of no votes, at 844.

Ostrander said he received 60 calls after the vote.

"It's not over," Ostrander said. "We will be going into closed session where I can discuss board options that attorneys have outlined items as related to election laws. Nothing has changed. The needs are still essential to the district. To put it off is only costly. In six months, the cost of the bond proposal is expected to increase by $725,000. That is an issue we will have to deal with. We need to focus on the future. We need to evaluate as a board collectively and evaluate what options the board will pursue."

Ostrander continued that many parents are angry and are asking for the proposal to be held "tomorrow." He said the proposal can be put to the voters every 90 days if there are 25 percent in modifications.

"It was a bare-bones proposal," Ostrander said. "I don't know where this board would come up with 25 percent without impacting the children. As a taxpayer, it's mismanagement for me to recommend that we just do the elementary school, and two years it's the middle school, three years it's the high school because the cost will be inflated."

He said general contractors are projecting an 8 percent increase in costs.

Ostrander thanked the many people who participated on the steering committee for the bond proposal.

The $16.9 proposal was to build a new elementary school at a cost of $8.37 million to ease overcrowding. Also included in the proposal was a plan to remodel and improve other buildings, improve athletic facilities and build a new district service center. Local property taxes would have been increased by 4.8 mills to be spread over a 25-year period life of the bond.

In other business, the board adopted a resolution to accept $278,671 as the judgment payment in the Durant case, which had to do with underfunding special education programs from 1991-1994. Half of the funds will be paid to the district in installments over 10 years. The other half will be paid after Nov. 16.

This gives the district $139,335 in November, which can be used for capital expenditures and improvements. The installment payments can only be used for textbooks, technology and software.

In other board business:
• Set June 8 as the annual school election day, with polls opening at 7 a.m. and closing at 8 p.m.
• Two seats are available for four-year terms, those of Michael Gordon and Mary Ann Crete. The last day to register to vote is May 11 until 5 p.m.
• Recognized senior Kristen Zimmermann and former Miss Edwardsburg as being one of the top 10 vocational education students in Indiana with her work in advertising design at the Elkhart Career Center.
• Alternative education instructor Jeff Kozinski introduced student Nathan Swanson.

Swanson related his experiences of failing in subjects and not being able to participate in sports. He said the program has influenced his life, bringing respect for authority. He is also achieving honor roll grades.

He said he has a new attitude for when he goes back to the mainstream high school.

"I am looking forward to the rest of high school days," Swanson said.

Ostrander commended him.

"This is what it's all about I have authored it (the program)," Ostrander said. "You have taken it beyond what it's all about."
New parking: The new parking and entrance area at Edwardsburg Primary are among items cut from the proposed $15.9 million bond issue which goes before the voters Sept. 22. The item was paid for through the school’s general fund.

EDWARDSBURG SCHOOLS

Construction bond revisited

BY DEE BOURDON  
Truth Regional Reporter  
EDWARDSBURG — School superintendent Sherman Ostrander told school board members in February, “there is no ‘Plan B.’ If we are unsuccessful this time, we will have to come back and ask for the same things that will probably cost more and we’ll get less.”

That statement proved prophetic as construction costs for the district’s proposed construction projects have risen 6 percent since February, Ostrander said recently.

Construction and furnishing of a new elementary school is estimated at $3.8 million or 51.4 percent of the requested levy. The school is but one phase of renovation and additions proposed by the district.

Increased costs forced some cuts, coupled with what was eliminated and what will come out of the general fund budget, to get the total amount to the $15.9 million figure, he said. The bond proposal defeated in February by four votes totaled $16.9 million.

School patrons go back to the voting booth Sept. 22 where they will be asked to approve a $15.9 million bond proposal.

This time voters will be asked to approve selling $15.9 million in bonds. The board hammered out the $1 million savings by eliminating the parking reconfiguration and new parking lot at the town elementary, the new roof at Eagle Lake Elementary and the new administration building and by cutting down some square footage in the expanded kitchen area of the middle school and in the new shared facilities building.

The parking lot and reconfiguration are being done this summer with general fund money at a cost of $142,000.

The roofing work was contracted at $200,000.

The elimination of a new administration building saves about $60,000.

This means instead of levying 4.8 mills the board would only have to authorize a levy of approximately 4.7 mills for the first six years with the millage decreasing slightly over the life of the bonds. The actual amount will depend on the interest rate the district must pay on the sale of its bonds.

The current debt millage rate in the Edwardsburg school system is 1.85 mills due to be paid off in 2012.

Voters are reminded the millage is levied only on the taxable value of a home and not the full market value. Senior citizens who qualify for the state Homestead Exemption tax should also qualify for the reduced property tax rate on the bond levy millage. If they have any questions they should contact their tax preparer or the county treasurer.
EDWARDSBURG SCHOOLS

Construction bond up for vote

Request for new school, facility cut by $1 million

By Dee Bourdon
Truth Regional Reporter

EDWARDSBURG — On Tuesday voters will be going to the polls where they are being asked to support a bond proposal to build a new elementary school, a new shared fine arts facility and allow for the upgrading, remodeling and additional work to be done on all of the district’s buildings and facilities.

In February, voters defeated a $16.9 million request by just four votes.

This time around, the request has been trimmed to $15.9 million. The $1 million savings was arrived at by eliminating construction of a new administration building and allowing for the reconfiguration of the parking lot at the town elementary, the new parking lot behind that facility and the new roofing at Eagle Lake Elementary to be completed this year with general fund money.

The reason for request the millage has not changed since the first election.

The school district is growing. Preliminary enrollment figures indicate a student increase in each of the four buildings with the largest growth at Eagle Lake Elementary and the middle school.

There are close to a dozen new housing developments in Ontwa Township; the school district includes parts of Jefferson, Milton, Mason and Howard townships.

The lower bond amount being requested translates to about a 4.47 mill increase as opposed to a 4.8 mill increase with the $16.9 million request. With a favorable bond interest rate, the millage rate could be lower, officials estimate.

Senior citizens who qualify for the Homestead Exemption tax should also qualify for the reduced property tax rate on the bond levy millage, officials said.

While the amount being asked is less, the six months lapse has resulted in an overall construction cost increase of about 6 percent, officials said. That means less for more money, Superintendent Sherman Ostrander said.

The current debt millage at Edwardsburg is 1.85 mills due to be paid off in 2012. The polls are open at Chicago Road School on Section Street from 7 a.m. to 8 p.m.

What the millage will pay for

- Construction and furnishing of a new elementary school, $8.3 million or 61.4 percent of the levy.
- Transportation facilities: Bus parking, paving, lighting, drainage and fencing, $300,946 or 1.9 percent of the levy.
- Outdoor facilities: Modify present stadium to accommodate football and soccer; convert track to eight lane Biedenbender design; reconstruct six tennis courts and allow for two additional courts, build new concession and stand with bathroom facilities, $730,000 or 5.9 percent of the levy.
- Shared facility: Construct new facility between the high school and the middle school to contain two art classrooms, one instrumental music classroom, one vocal music classroom and one multipurpose classroom, $1.823 million or 10.6 percent of the levy.
- Edwardsburg High School: Remodel existing classroom for wrestling/competitive cheerleading purposes; remodel band room into two classrooms; remodel life skills room; to science lab; replace gym/cafeteria roof; lighting for student parking; new staff/visitor center of the levy.
- Edwardsburg technology: Update servers, computers, printers — all buildings; purchase hardware to automate elementary libraries; equip a community lab; update high/middle school industrial arts area technology, $940,000 or 3.2 percent of the levy.
- Edwardsburg Middle School: New construction to include three classrooms and a science lab plus a smaller than originally planned expansion of the central kitchen to include additional cooler, freezer, storage space and loading dock; add air conditioning for interior classrooms; increase lighting in the visitors and staff parking areas and develop football and soccer fields for physical education and athletics, $1,593 million or 9.7 percent of the levy.
- Edwardsburg Primary: Improve classroom storage and classroom work, $571,022 or 3.4 percent of the levy.
- Eagle Lake Elementary: Improve classroom storage; expand food service and add 50 new parking spaces, $792,568 or 4.7 percent of the levy.
$15.9 million requested for construction

Plan includes new elementary school, many renovations

EDWARDSBURG — Making a $1 million cut from a previous proposal, Edwardsburg School Board members this week approved asking voters in September for a $15.9 million bond issue to finance school construction and renovations. In February voters by a margin of four votes turned down a $16.9 million bond issue.

Under the revised proposal, the bond issue would pay for a new elementary school, additions and renovations to all existing buildings, and improvements to high school athletic facilities.

The revised issue will ask voters for approval to sell bonds totaling $15.9 million, which would create a 4.5 mill debt levy increase beginning in November of this year. The mill debt levy would be 0.3 mill less than previously requested.

Superintendent Sherman Oslander pointed out the increase could be less than 4.5 mills if the interest rate the bonds are sold for is less than 6 percent. He said the state mandates estimates for school bond projects be figured at a 6 percent sale price. The bonds would be repaid in 25 years. The September bond issue will not include roofing at Eagle Lake Elementary School, a primary parking lot and alternate parking site, and a new administration building.

Oslander said general fund money will pay for the roofing and parking lot projects this summer.
Edwardsburg to vote on $15.95 million bond issue

By BRYON COPPENS
Tribune Staff Writer

EDWARDSBURG — Edwardsburg Public Schools administrators say their students are in dire need of more elbow room and they're hoping voters will give them just that.

Edwardsburg voters will revisit a bond issue Tuesday to fund the construction of a new elementary school, additions to the middle and high schools, renovations at all four school buildings, technology improvements and development of playground and athletic facilities.

The new elementary school, which accounts for more than half the bond issue dollar amount, would be built to accommodate 440 fourth- and fifth-graders.

Superintendent Sherman Oslander described the millage as critical to continuing high standards of education in Edwardsburg schools.

"We've earned through hard work a reputation of quality and excellence," Oslander said.

"At one time, our facilities were adequate, but they've aged. They need to be young again in order for us to be competitive."

The $15.95 million proposal calls for a 4.5-mill increase.

A mill equals $1 of property taxes for each $1,000 of taxable value of a home. Proposal A established the taxable value of a home as 45.79% of the home market value. The millage proposal before Edwardsburg voters would increase the yearly property tax on a $100,000 home by $450.

Rick DeJonge, principal at Eagle Lake Elementary, said that overcrowding is so bad at his school that even closets are used for tutorial sessions and the hallways are cluttered with equipment because there's no other place to put it.

Last year, the school switched from having three separate lunch periods to four due to the limited space in the cafeteria. Most schools have only two lunch periods, DeJonge said.

And a six-room wing added to Eagle Lake earlier this decade is already overflowing with pupils, including one room which was originally intended for storage.

"With the continuing development boom in Edwardsburg, DeJonge said, things are only going to get worse."

Administrators have said that the school system has grown by 270 students over the last five years and is projected to grow by 120 students over the next five years.

The middle school enrollment (grades six, seven and eight) was at 478 in the 1997-98 school year and is expected to be at 539 by 2002-03, while high school numbers are expected to grow from 586 to 700.

Oslander said the results of a survey taken after the last bond issue failed indicated that many of those who voted against the proposal simply didn't want to pay more taxes.

See MILLAGE; Page B2

Music teacher Angela Fabian asks her students for a show of hands last week in a classroom at Eagle Lake Elementary School in Edwardsburg.
"Unfortunately the only way to build an $8 million elementary school is to have a bond referendum to secure voter approval," Ostrander said.

Ostrander hopes this "bare bones" proposal will sway enough voters for the bond issue to pass this time around.

The school board trimmed more than $1 million in projects from the bond issue proposal which failed by four votes in February.

Items cut from the original plan include a new administrative building, a new roof for Eagle Lake Elementary School, athletic expenditures and parking lot renovations.

Money for the new roof and parking lot work was instead taken from the schools' general operations fund. Those projects were completed over the summer.

Voting for the bond issue election will take place from 7 a.m. to 8 p.m. at the Chicago Road School Building, 69410 Section St., in the Board of Education Room.

### Edwardsburg millage request

<table>
<thead>
<tr>
<th>Project</th>
<th>Estimated Cost</th>
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<tbody>
<tr>
<td>New elementary school</td>
<td>$8,633,460</td>
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<tr>
<td>- Will house fourth and fifth grades.</td>
<td></td>
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<tr>
<td>- Designed for a capacity of 450 students.</td>
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<tr>
<td>Edwardsburg Primary School</td>
<td>$571,122</td>
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<tr>
<td>- Improve classroom storage, which increases instructional area.</td>
<td></td>
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<tr>
<td>- Remodel classrooms.</td>
<td></td>
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<tr>
<td>- Remodel bathrooms to meet federal Americans with Disabilities Act (ADA) requirements.</td>
<td></td>
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<tr>
<td>- Complete second phase of renovations to bus drop-off/pickup area.</td>
<td></td>
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<tr>
<td>Eagle Lake Elementary:</td>
<td>$792,568</td>
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<tr>
<td>- Improve classroom storage, which increases instructional area.</td>
<td></td>
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<tr>
<td>- Remodel classrooms.</td>
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<tr>
<td>- Remodel bathrooms to meet ADA requirements.</td>
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<tr>
<td>- Expand kitchen preparation/storage area.</td>
<td></td>
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<tr>
<td>Edwardsburg Middle School</td>
<td>$1,593,523</td>
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<tr>
<td>- Add four classrooms.</td>
<td></td>
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<tr>
<td>- Expand central food preparation facility.</td>
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<tr>
<td>- Improve lighting of student drop-off/pickup area.</td>
<td></td>
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<tr>
<td>- Improve physical education outdoor facilities.</td>
<td></td>
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<tr>
<td>Edwardsburg Middle School and Edwardsburg High School shared facilities:</td>
<td>$1,823,296</td>
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</tbody>
</table>

- Add two art classrooms.
- Add one instrumental music classroom.
- Add one vocal music classroom.
- Add one multipurpose classroom.
- Edwardsburg High School: $1,812,886
- Remodel classrooms and improve lighting.
- Add life skills classroom.
- Add science classroom.
- Add student parking lot.
- Relocate staff/visitor parking.

### Technology: $540,600

- Upgrade technology infrastructure.
- Update servers, computers, printers in all buildings.
- Upgrade monitors and video equipment.
- Automate elementary school libraries.

### Outdoor facilities: $730,258

- Modify present stadium to accommodate both football and soccer.
- Convert track to eight-lane design.
- Reconstruct existing tennis court.
- Build new concession stand with bathrooms to meet ADA standards.

### Transportation facilities: $317,207

- Relocate bus parking area.
- Improve bus security by adding lighting and fencing to protect vehicles.

**Total proposed: $16,814,960**

**less interest earned ($864,960)**

**Final amount: $15,95 million**
By MELISSA BETH WIESE
Vigilant/Argus

EDWARDSBURG — They're doing it for the kids. Members of the community, concerned parents and the Edwardsburg school board and administration are finishing up promotion of the bond proposal millage, which comes to a vote Tuesday, Sept. 22.

School elections have notoriously low voter turnouts, but the bond millage vote in February broke records in the district. While 840 voters supported the bond, 844 did not.

Jack Gregory, chairperson of Citizens For Excellence In Education, has two children still in the Edwardsburg school district; one at Eagle Lake and the other in the middle school. A third is an Edwardsburg High School graduate, currently attending Michigan State University.

He's concerned about the future of the district and the quality of education his children will receive.

Last time, not knowing much about school elections, with all the informational sessions and promotion the district did, Gregory thought the issue might bring 600 people to vote.

As he puts it, people much more knowledgeable about school elections told him to expect a couple hundred less.

"We shook all the trees," Gregory said. The record turnout was a surprise, as were the amount of no voters.

"My greatest concern is the voters who said yes in February say yes this time," Gregory said.

Gregory said the no voters probably had issues in the bond they didn't agree with. The school board and

See BOND page 2

<table>
<thead>
<tr>
<th>New Elementary School</th>
<th>$8,633,460</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edwardsburg Primary School</td>
<td>$4,530,460</td>
</tr>
<tr>
<td>- Improved classroom storage</td>
<td></td>
</tr>
<tr>
<td>- Remodeled classrooms</td>
<td></td>
</tr>
<tr>
<td>- Remodeled bathrooms to meet ADA requirements</td>
<td></td>
</tr>
<tr>
<td>- Complete phase 2 bus drop off/pick up</td>
<td></td>
</tr>
<tr>
<td>Eagle Lake Elementary</td>
<td>$571,122</td>
</tr>
<tr>
<td>- Improved classroom storage</td>
<td></td>
</tr>
<tr>
<td>- Remodeled classrooms</td>
<td></td>
</tr>
<tr>
<td>- Remodeled bathrooms to meet ADA requirements</td>
<td></td>
</tr>
<tr>
<td>- Expand kitchen preparation/storage area</td>
<td></td>
</tr>
<tr>
<td>Edwardsburg Middle School</td>
<td>$792,568</td>
</tr>
<tr>
<td>- Four additional classrooms</td>
<td></td>
</tr>
<tr>
<td>- Expansion of the central food preparation facility</td>
<td></td>
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<tr>
<td>- Improved lighting of student drop off/pick up area</td>
<td></td>
</tr>
<tr>
<td>- Improvements of physical education outdoor facilities</td>
<td></td>
</tr>
<tr>
<td>Middle School/High School shared facilities</td>
<td>$1,593,386</td>
</tr>
<tr>
<td>- 2 art classrooms</td>
<td></td>
</tr>
<tr>
<td>- 1 instrumental music classroom</td>
<td></td>
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<tr>
<td>- 1 vocal music classroom</td>
<td></td>
</tr>
<tr>
<td>- 1 multi-purpose classroom</td>
<td></td>
</tr>
<tr>
<td>- Five classrooms will become available in the high school</td>
<td></td>
</tr>
<tr>
<td>- Above rooms would be utilized by both schools</td>
<td></td>
</tr>
<tr>
<td>Edwardsburg High School</td>
<td>$1,823,786</td>
</tr>
<tr>
<td>- Remodeled classrooms and improve lighting</td>
<td></td>
</tr>
<tr>
<td>- New life skills classroom</td>
<td></td>
</tr>
<tr>
<td>- Addition of a new science classroom</td>
<td></td>
</tr>
<tr>
<td>- New student parking lot</td>
<td></td>
</tr>
<tr>
<td>- Relocation of staff/visitor parking</td>
<td></td>
</tr>
<tr>
<td>Technology</td>
<td>$1,812,886</td>
</tr>
<tr>
<td>- Upgrade technology infrastructure</td>
<td></td>
</tr>
<tr>
<td>- Upgrade servers, computers, printers - all buildings</td>
<td></td>
</tr>
<tr>
<td>- Upgrade monitors/video equipment</td>
<td></td>
</tr>
<tr>
<td>- Autonomous elementary libraries</td>
<td></td>
</tr>
<tr>
<td>- $540,600</td>
<td></td>
</tr>
<tr>
<td>Outdoor facilities</td>
<td>$730,298</td>
</tr>
<tr>
<td>- Modify present stadium to accommodate football and soccer</td>
<td></td>
</tr>
<tr>
<td>- Convert track to 8 lane design</td>
<td></td>
</tr>
<tr>
<td>- Reconstruct existing tennis court</td>
<td></td>
</tr>
<tr>
<td>- Build new concession stand with bathrooms meeting ADA standards</td>
<td></td>
</tr>
<tr>
<td>Transportation facilities</td>
<td>$317,207</td>
</tr>
<tr>
<td>- Relocate bus parking area</td>
<td></td>
</tr>
<tr>
<td>- Improve bus security by adding lighting and fencing</td>
<td></td>
</tr>
<tr>
<td>Total Proposal:</td>
<td>$16,814,960</td>
</tr>
<tr>
<td>less interest earned:</td>
<td>$(864,960)</td>
</tr>
<tr>
<td>Final Amount:</td>
<td>$15,950,000</td>
</tr>
</tbody>
</table>
administration went back to reformulating the bond to
lower the cost.

The end result: exactly $1 million was cut out of the
bond proposal, including taking out a proposed district
service center, the primary school parking lot and Eagle
Lake roof from the proposal. The primary school parking
lot and Eagle Lake roof were worked on during the sum-
ter and the funds were taken out of the general fund.

But taking $1 million out of the bond actually means
the voters will receive less for their money, because the
cost of construction is expected to rise, according to
Superintendent Sherman Ostrander.

The perception was that taxes would be too high, so
the proposal was stripped down even more, he said.

"We’re appealing to the interest in children of the
Edwardsburg community," Ostrander said.

After a marketing survey conducted by Andrews
University, the district learned what some of the concerns
with the original proposal were, and dealt with a lot of
issues he said, including paring down the proposal.

Last time, for months, administrators, the school board
and committee members spent time promoting the bond
issue. This time, Gregory said they took a more grass
roots approach.

Through the survey, they found three or four issues
voters felt uncomfortable with, and addressed them.

For the concern of higher taxes, there was nothing to
be done. But the board instead took it as a directive to
make sure items included were essential.

The big issue, Gregory said, was spending some of the
extra money in the general fund.

Some of the more urgent needs were taken care of,
because the district couldn’t wait for another vote on the
bond millage, school board president Della Holdread
said.

The primary parking lot was an issue of safety. The
parking was limited, and with the growing population
of the school, that meant more and more parents coming
to pick up their children, and more traffic. That also meant
that the children were at risk.

Only half of the parking lot project was done out of the
general fund, Holdread said. The most urgent need, pro-
viding spaces for parents and a better traffic pattern, as
well as providing staff parking and extra event parking in
the back, has been taken care of.

The Eagle Lake Elementary roof was also a concern
taken out of the original proposal. The project needed to
be completed while school was out.

"We really couldn’t wait another year for the roof," Holdread said.

For right now, the district service center will be left
out. Though there are problems with termites, asbestos
and lead paint, the Chicago Road School, the current
administration building, has nostalgic value for those who
went to school there.

To do any major renovations would mean the district
would have to bring it up to code, which would cost about
$2 million, Gregory said. The alternative would be to
construct another building to house the administration.

The district service center was dropped from a practi-
cal standpoint. Gregory said. It is not an urgent need as
the new elementary school, the largest ticket item on the
bond. The choice will come some time in the future to
voters, about whether they would like to spend several
million to bring it up to code.

He said he has heard feedback from people who voted
no the last time, who said they feel comfortable voting
yes now.

"Their concerns have been addressed," Gregory said.
If the yes voters continue to vote yes, and the Citizens for
Excellence in Education and the school board and admin-
istration have gotten through to more voters, and voter
response stays high, he feels confident that the vote will
pass, this time by a few hundred votes.

The Eagle Lake sewer issue, which is an ongoing con-
cern, has also been a perceived problem. If people in that
area were going to be paying extra money for a sewer,
they didn’t want to be paying more on top for the bond.

But this time, Gregory said he has heard support from
some of those people.

From working with parents, to giving presentations to
the Edwardsburg Business and Professional Women’s
Club and the Golden Agers, the district has also been
working on promoting the bond.

The last week before the bond should be a busy one.
Holdread said, with open houses and informational ses-
sions.

"We had no awareness of any organized opposition," Gregory said in reference to the last vote. "Clearly, some
people were opposed to it."

Comparing the bond millage proposal to other dis-
tricts, he said those schools aren’t getting what they asked
for either.

Holdread said she’s feeling good about the election.
"I think we’ve listened to the comments people have
made," Holdread said.

Pastor Jeff Reese, part of the steering committee for
the bond referendum and pastor of Hope United
Methodist Church, said it is important to prepare kids for
the future, and the 21st century.

He has children who will go through Edwardsburg
Public Schools.

"We are not a large school district, but we are a school
district that cares about the kids," Reese said. He consid-
ers the millage to be a reinvestment for the future. "It’s
not just for my children but for the children of this com-
munity."

The polls open for voting at 7 a.m. and close at 8 p.m.
at the Chicago Road School, board of education meeting
room.
EDWARDSBURG FACILITY IMPROVEMENTS

On September 22, 1998, voters within the Edwardsburg Public School District supported a $15,950,000 bond referendum representing the largest bond proposal in district history. Community approval allowed Edwardsburg Public Schools to construct a new 4th and 5th grade specific Intermediate School. Additional facility renovations and enhancements were also made to each of the school buildings throughout the district.

Edwardsburg High School

The construction of a state of the art Fine Arts Center which houses vocal, instrumental music, art classes, and a new distance learning lab. Extensive remodeling occurred within each of the science, social studies, and family living classrooms, along with technology enhancements made school-wide.

Edwardsburg Middle School

The addition of four air-conditioned classrooms designed for language arts, social studies, and science instruction along with extensive technology upgrades have been made, including a new student computer lab. The central food service area was also expanded to provide increased storage facilities.

Edwardsburg Intermediate

This beautiful 70,000 square foot structure features sixteen 1,000 square foot carpeted classrooms, integrated technology, air-conditioning, along with centralized activity labs and common instructional areas in each pod. The media center, computer lab, music room and separate gymnasium and cafeteria complete this truly outstanding educational facility.

Eagle Lake Elementary

Classroom renovations including, electrical and lighting upgrades, enhanced technology, drop ceilings, cabinetry, exterior doors, along with expanded parking facilities which have or will be completed in the near future.

Edwardsburg Primary

Renovations to classrooms, electrical upgrades, newly remodeled bathrooms, technology upgrades and classroom upgrades have or will be completed in the near future.

Extra-Curricular

The entire athletic complex has been completely renovated including a new eight-lane track, football and soccer field(s), pressbox, stadium lighting, concession stand, expanded tennis courts and entryway into the Leo Hoffman Stadium. In addition, a middle school athletic field has been added, complete with bleacher seating and scoreboard, along with a new varsity girls softball field that is scheduled for construction.
PRESS RELEASE

On Wednesday, October 28, 1998 the Edwardsburg School Board accepted Bids to finance the $15,950,000 Bond Issue approved by the Voters on September 22, 1998.

Six Bids were received.

4.89 the low bid by Dain Rauscher was accepted by the School Board.

In the process of preparing documents to conduct an Election and approved by the State Department of Treasury the Financial Consultant has filed the following Maturity Schedule for the September 22, 1998 vote.

<table>
<thead>
<tr>
<th>Date</th>
<th>Interest Rate</th>
<th>Total Interest (25 years, 6 mos.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/22/98</td>
<td>6.00%</td>
<td>$17,162,400</td>
</tr>
<tr>
<td>6/22/98</td>
<td>5.75%</td>
<td>$15,532,763</td>
</tr>
<tr>
<td>10/98</td>
<td>5.25%</td>
<td>$14,570,138</td>
</tr>
<tr>
<td>10/28/98</td>
<td>4.89%</td>
<td>$13,187,055</td>
</tr>
</tbody>
</table>

The amount of debt millage levied annually depends on one other major factor. "The State Equalized Valuation" of the School District. In accordance with Prop. A, the annual increase on existing properties cannot be greater than the annual rate of inflation but never greater than 5%. This is in addition to new construction.

The savings to the Taxpayer of $3,975,345 (1 minus 4) is significant and is a credit to the School Board employing a knowledgeable Financial Advisor in Stauder & Barch Assoc., and a dedicated Financial Supervisor who provides information to the Bond Buyer showing that the investment in the Edwardsburg Public Schools was worthy of an AAA Rating by Standard-Poor.
Appendix K

Human Subjects Institutional Review Board Approval Letter
Date: July 9, 2004

To: Gary Wegenke, Principal Investigator
    Scott Moellenberndt, Student Investigator for specialists project

From: Amy Naugle, Interim Chair

Re: Approval not needed

This letter will serve as confirmation that your project “A Superintendents’ Guide to a Successful Bond Proposal” has been reviewed by the Human Subjects Institutional Review Board (HSIRB). Based on that review, the HSIRB has determined that approval is not required for you to conduct this project because you are not collecting information about individual subjects. Thank you for your concerns about protecting the rights and welfare of human subjects.

A copy of your protocol and a copy of this letter will be maintained in the HSIRB files.
GLOSSARY / DEFINITION OF TERMS

Accrued Interest: Interest earned on a bond since the last payment date.

Ad Valorem Tax: A tax based on the assessed value of property.

Amortization: Special periodic payments which pay off the debt.

Assessed Valuation: The valuation placed on property for purposes of taxation.

Basis Book: A book of mathematical tables used to convert yield percentages to equivalent dollar-prices.

Basis Price: The price expressed in yield or net return on the investment.

Bond: An interest-bearing promise to pay with a specific maturity.

Bond Issue: An election held to give a school district the authority to sell bonds to be repaid with money garnered from a tax increase.

Callable Bond: A bond that is subject to redemption prior to maturity at the option of the issuer.

Closed Lien: A pledge made solely to one issue that prohibits further pledging of the resource.

Coupon: The part of a bond which evidences interest due. Coupons are detached from bonds by the holders usually semi-annually and presented for payment to the issuer’s designated paying agent.

Coverage: This is a term usually connected with revenue bonds. It indicated the margin of safety for payment of debt service, reflecting the number of times or percentage by which earnings for a period of time exceed debt service payable in such period.

Current Yield: A relation stated as a percentage of the annual interest to the actual market price of the land.

Debt Service: The statutory or constitutional maximum debt-incurring power of the school district.

Debt Ratio: The ratio of the issuer’s debt to a measure of value, such as assessed valuation, real value, and so on.

Debt Service: Required payments for interest on and retirement of principal amount of a debt.

Default: Failure to pay principal or interest promptly when due.

Denomination: The face amount of pay value of a bond that the issuer promises to pay on the bond’s maturity date.

Discount: The amount, if any, by which the principal amount of the bonds exceeds the cost price.
**Dollar Bond:** A bond that is quoted and traded in dollars rather than in yield.

**Double-Barreled Bonds:** A bond secured by a pledge of two or more sources of payment (e.g., special assessments and unlimited taxing power of the issuer).

**General Obligation:** A bond secured by pledge of the issuer’s full faith and credit and taxing power.

**Gross Debt:** The total of the debtor’s obligation.

**Infrastructure:** School buildings or facilities designed for use in the education of children.

**Interest:** Compensation paid or to be paid for the use of money.

**Interest Dates:** The dates on which interest is payable to the holders of bonds, usually set at semi-annual intervals on the 1st or the 15th of the month.

**Interest Rate:** The interest payable each year, expressed as a percentage of the principal.

**Issuer:** A municipal unit that borrows money through sale of bonds.

**Legal Opinion:** An opinion concerning the legality of a bond issue by a recognized firm of municipal bond attorneys specializing in the approval of public borrowing.

**Limited Tax Bond:** A bond secured by the pledge of a tax that is limited as to rate or amount.

**Marketability:** The measure of ease with which a bond can be sold in the secondary market.

**Maturity:** The date upon which the principal of the bond becomes due and payable.

**Mill:** One unit of the factors against which property taxes are computed. One mill is equal to $1.00 for every $1,000,000 of state equalized valuation (SEV) of a property.

**Net Debt:** Gross debt less sinking fund accumulations and all self-supporting debt.

**New Issue Market:** Market for new issues of municipal bonds.

**Official Statement or “O.S.”:** An official document prepared by the investment banker or the issuer that gives in detail the security and financial information relating to the issue.

**Operating Funds:** The money budgeted by a school district for all costs of operating the educational programming of the district, excluding building construction or renovation.

**Overlapping Debt:** That portion of the debt of other governmental units for which residents of a particular school district are responsible.

**Par value:** The face amount of the bond usually $1,000 or $5,000.
Paying Agent: Place where the principal interest is payable, usually a designated bank or the treasurer's office of the issuer.

Premium: The amount, if any, by which the price exceeds the principal amount of the bond.

Principal: The face amount of a bond, exclusive of accrued interest.

Ratings: Designation used by investors' services to give relative indications of quality. Normally Moody or Standard & Poor are the rating agencies.

Refunding: A system by which a bond issue is redeemed from the proceeds of a new bond issue at conditions generally more favorable to the issuer.

Registered Bond: A bond whose ownership is registered with the issuer or its agents for principal and interest or for the principal only.

Revenue Bond: A bond payable from revenues secured from a project which pays its way by charging rentals to the users, such as toll bridges or highways, or from revenues from another source which are used for public purpose.

Secondary Market: Market for issues previously offered or sold.

Self-Supporting Debt: Debt incurred for a project or enterprise requiring no tax support other than the specific revenue earmarked for the purpose.

Serial Bond: A bond of an issue that has maturities scheduled annually or semi-annually over a period of years.

Sinking Fund: A reserve fund accumulated over a period of time for retirement of a debt.

State Equalized Valuation: The amount of money a local assessing agency assigns to a property. The SEV amount is usually one-half of the predicted value of the property.

Special Tax Bond: A bond secured by a special tax, such as gasoline or tax increment

Subdivision: A unit of government, such as a county, city, school district, or town.

Tax Base: The total resources available for taxation.

Tax Exempt Bond: A bond, tile interest on which is exempt from Federal income tax

Tax Exempt Bond Fund: Registered unit of investment trusts, the assets of which are invested in diversified portfolio of interest-bearing municipal bonds issued by the states, cities, counties, and other political subdivisions.

Term Bond: A bond of an issue that has a single maturity.

Trading Market: The secondary market for issued bonds.

Trustee: A bank designated as the custodian of funds and official representative of bondholders.
Unlimited Tax Bond: A bond secured by pledge of taxes that may be levied in unlimited rate or amount.

Yield: The net annual percentage or income from an investment. The yield of a bond reflects interest rate, length of time to maturity, and write-off of premium or discounts.

REFERENCES


BIBLIOGRAPHY


