

League of Women Voters Metropolitan Tulsa Education Bond Measures Study Consensus Meeting August 2016

CONSENSUS QUESTIONS FOR MEMBERSHIP CONSIDERATION

1. Why should or should not the League endorse school bond issues?
2. What criteria should be developed to evaluate the merits of a school district's bond issue?
3. The Study Committee has done thorough research to study this question. What other concerns should be included in the study?

SUMMARY

The Membership of the LWVMT voted to undertake a school bond election study for the purpose of enabling the LWVMT to offer a formal endorsement for local school bond proposals.

A task force commenced their review and study of the issue in August 2015 and submitted their recommendations to the Board of Directors in June 2016.

Members of the task force included LWVMT members: Ros Elder, Julie Gustafson, Kara Gae Neal, and Patti Mullen (task force chair).

The committee gathered information through research, a set of criteria for guiding questions, and interviewing knowledgeable professionals, an elected school board member, and school administrators / superintendents over a period of 8 months.

The information below summarizes the research and findings.

RESOURCES

Personal interviews conducted

Dr. Keith Ballard, Superintendent of Tulsa Public Schools (2007 – 2015)

Eric Nelson, Attorney for Rosenstein, Fist and Ringold which serves as counsel of record for Tulsa and Jenks Public School Districts (and several other districts throughout the State)

Ron Fisher, President of Stephen H McDonald & Assoc, financial advisors for public school districts

Dr. Stacey Butterfield, Superintendent of Jenks Public Schools

Cody Way, CFO for Jenks Public Schools

Ruth Ann Fate, Board Member, Board of Education for Tulsa Public Schools

Chris Hudgins, Director of Board Projects & Energy Management, Tulsa Public Schools

Outreach to other LWV chapters

No other chapter in Oklahoma had a position specifically on education bond endorsement to allow for concurrence

Stillwater and Bartlesville LWV Chapters responded to an inquiry by LWVMT concerning education bond policies. (Active chapters in Oklahoma: Bartlesville, Lawton, Norman, Stillwater & Tulsa).

Other LWV chapters outside of Oklahoma that have endorsed school bond issues include the following:
LWV Diablo Valley, CA, LWV Greater Cleveland, OH, LWV St. Tammany Parish, LA, & LWV Alameda, CA

Study Materials

LWVUS Position on Education (adopted March 2012)
LWVOK Position (adopted 1973)
Oklahoma Constitution & Statutes (Legal)
Bond Finances “Things You Need to Know” (Financial)
Tulsa Public Schools Bond Proposal 2015
Tulsa Public Schools Bond Oversight Committee Update: 2016
Various on-line articles and studies regarding school financing

KEY FINDINGS

Guiding Questions that were established for Education Bond Measure study

1. What prompted the school district bond proposal?
2. What are the goals of the school district?
3. What process was employed by the school district to arrive at bond measure?
4. Does proposed measure adhere to existing legal guidelines?
5. Will funded projects be sustainable over time?
6. Can school district demonstrate expenditures were implemented as approved by voters?

What prompted the school district bond proposal?

From the Study, the Committee learned the needs of school districts are part of a continuous analysis of the district’s population growth, the physical and instructional needs of the district and the district’s bonding capacity at the time of the election.

Funding can only be used for capital improvements (buildings), instructional needs (technology) and transportation (buses).

What are the school district’s goals for the bond proposal?

From the Study, the Committee learned that each district’s Board of Education weighs the suggested needs against the district’s capacity to fund the projects and the willingness of the community to support a super-majority vote beyond 60% to pass the bond election.

It was determined that 6 states require the super majority - 60% - for passage. This number includes Oklahoma.

Financial goals are capped at 10% of district’s net assess value.

What process was employed by the school district to arrive at the final bond proposal to taxpayers?

From the Study, the Committee learned that districts rely on district personnel and school patrons to review past needs and determine new and complementary support (repairs) for the districts capital improvements.

Research is involved, ex: Jenks PUS commissioned demographic study.

Equity for all students is a critical element of the final bond proposal.

Public input is gathered via public meetings, surveys, feedback from teachers and administrators.

Does the proposed bond proposal adhere to existing legal requirements?

From the Study, the Committee learned that all districts contract with attorneys and bondsmen to assure compliance with extensive state requirements and laws regarding the offering of bond issues to a public vote, the election process, timing of the sale of the bonds and the accountability of bond funds to stated projects.

Will funded projects be sustainable over time?

From the Study, the Committee learned that districts use a variety of techniques to assure voters of compliance with the approved bonds and use tracking records to monitor the expected duration of a capital project such as busses, buildings and technology among other priority items.

Can the school district demonstrate expenditures were implemented as approved by voters?

Fact: Schools must list 75% of a project and pay out 85% of a bond

From the Study, the Committee learned that districts use many techniques to keep voters informed as a continuous public relations endeavor in preparation for the next bond issue.

Districts use posted signs of appreciation at new or remodeled construction sites.

Most employ their websites to maintain an up to date accounting of the progress of voted projects.

Tulsa Public Schools has a permanent committee of community members, board members and school personnel to monitor bond projects.

Jenks offers a class through their Continuing Education program about the school bond election process in general, with specific content related to the Jenks Public Schools bond elections.

CRITERIA DEVELOPED BY COMMITTEE

The LWV/MT's ability to endorse a school district's proposed School Bond Measures will be determined by or through using the following criteria:

The governing School Board provides evidence that their proposed Bond Measures:

- ***Conform to all local and state legal mandates,***
- ***Reflect the needs of the school district through equity to all students,***
- ***Include community participation,***
- ***Provide information regarding the bond measures to the voters through various media,***
- ***Incorporate methods for public accountability, sustainability, and transparency following successful passage of the bond measures***