



HOW TO PASS A SCHOOL DISTRICT BOND REFERENDUM

2026 SBA ANNUAL CONVENTION
FEBRUARY 20, 2026

LEARNING OBJECTIVES

- **Understand Strategies for Community Engagement:**

Participants will learn how to establish and sustain meaningful community involvement through tools like citizen-led committees and open communication strategies.

- **Explore Methods for Building Public Trust:**

Discover how using transparency and accountability practices to inform the public about quality facilities data (FCA) and planning (Facilities Master Plans), can rebuild public trust in complex initiatives like bond referenda.

- **Develop Skills for Effective Collaboration:**

Gain insights into fostering collaboration among diverse stakeholders, including citizens, school leadership, and community groups, to align goals and ensure project success.

- **Apply a Proven Process to Future Initiatives:**

Learn how to adapt BCSD's framework for designing a process and involving the public in funding measures to meet the unique needs of other districts or organizations.

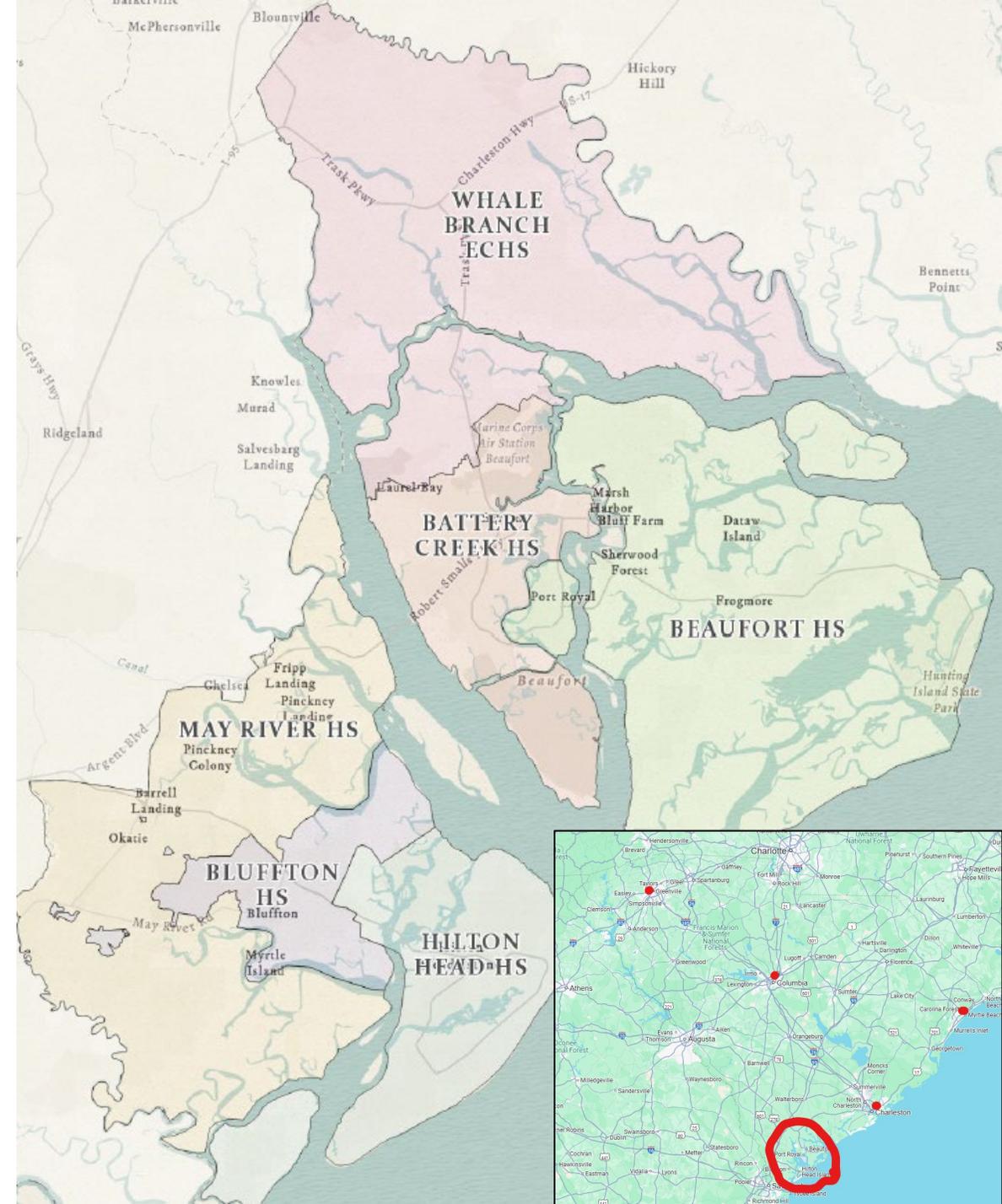
ABOUT BEAUFORT COUNTY SOUTH CAROLINA



BEAUFORT COUNTY
SCHOOL DISTRICT

BEAUFORT COUNTY

- Population at 2020 Census 187,117. Estimated 198,979 (2023)
- >576 sq mi of land area and is the 26th largest county in South Carolina by total area.
- BCSD Student population = 21058 in FY25.
- Distinct communities defined by water and history
- Different areas grew at different rates over time.





HOW ARE FACILITIES FUNDED IN SOUTH CAROLINA?

FUNDING FACILITIES NEEDS

There are only 3 ways to fund Capital Improvement Projects (CIP) in South Carolina:

- I. A Referendum passed by a majority of the voters for specific designated capital projects.
 - A. General Obligation Bond – Repaid through property taxes
 - B. Penny Sales Tax Bond – Repaid using revenue from local sales tax.
2. 8% Funding – which allows for the District to borrow up to 8% of the assessed value of the property in the county
3. Impact fees – assessed for areas experiencing growth to finance the impact the developments create on support services and facilities. Can be used for schools, fire departments, etc.



HOW LONG DID BEAUFORT COUNTY
SCHOOL DISTRICT GO WITHOUT PASSING
A BOND REFERENDUM AND WHY?

HISTORY – REFERENDA AND LEADERSHIP

2008
Referendum
\$162.7M
52% YES

2016
Referendum
\$217M
2 Questions on
ballot
Traditional Bond
Penny Sales Tax
45% YES on Bond
41% YES on Penny

2018
Referendum
\$76M
28% YES

2019
Referendum
\$344M
2 Questions
68% Yes

2023
Referendum
\$439M
72% Yes

11 years without passing a Capital Projects Bond Referendum

Supt A

B

Supt C

D

Supt E



TAKING A CRITICAL LOOK AT:

THE GOOD
THE BAD
AND THE UGLY

Board Mistrust of All Staff

Public Mistrust of Staff

Public Mistrust of District

THE UGLY



The State

<https://www.thestate.com> › state › article94924407

SC county superintendent fined after wife hired for \$90K job



Hilton Head Island Packet

<https://www.islandpacket.com> › local › article237878974

[REDACTED] SC Ethics ruling reached, FBI investigation ongoing



Greenville Online

<https://www.greenvilleonline.com> › news › 2018/08/15

FBI subpoenas SC school district again

Aug 15, 2018 — The Beaufort County School District has again been subpoenaed by the US Attorney's Office for documents related to former superintendent [REDACTED]



AP News

<https://apnews.com> › article

Feds subpoena SC school district in construction probe

THE BAD

BEAUFORT NEWS

What's 2/3 of 11? The school board isn't sure, and it doesn't want you to see it do the math

Beaufort County school board held a secret meeting to talk about hiring a 'marriage counselor'

The Beaufort County school board — often criticized for its bickering, lack of transparency and perceived failure to hold the superintendent accountable — appears to have used an already-completed superintendent's evaluation at Tuesday's board meeting as a cover to discuss their own messy relationship in private and away from the public eye for 90 minutes.

Dead rat left at door? New revelation adds to Beaufort County school board's messy divide

Here's why one Beaufort Co. school board member called the cops on another in a meeting

Snippy exchanges, eye rolling and under-the-breath comments have tainted many of the board's public meetings in the past two years. The extent to which this intensifies in the privacy of executive sessions — which, per board policy, prohibits members from publicly sharing — has previously been unknown, but the report sheds light on just how uncivil board relations have become.

THE GOOD

We learned from the past by analyzing the data and understanding the needs of the community



HOW DO YOU GO FROM THE UGLY
TO THE GOOD?



STAY OUT OF THE NEWSPAPER!

Accountability

Take responsibility
for your actions and
the actions of your
co-workers

DO THE WORK - ON TIME AND UNDER BUDGET





BEAUFORT COUNTY SCHOOL DISTRICT

Beaufort, South Carolina

FACILITIES MASTER PLAN



Outline Needs

ANNUAL UPDATE

January 2025

Frank Rodriguez, Ph.D., Superintendent • www.beaufortschools.net

SOUL SEARCHING

- ❑ Facilities Master Plan (rolling 5-year plan)
- ❑ Programmatic changes to schools
- ❑ Enrollment Projections through careful computer mapping of resident students over time
- ❑ Changes in Student Assignment – attendance zone changes resulting from enrollment changes or opening of new schools
- ❑ Involving the Community and school in planning
- ❑ Energy Management and Indoor Air Quality
- ❑ Capital Improvement (8%) Projects funded annually
- ❑ 2019 & 2023 Bond Referendum Projects

SOUL SEARCHING

ANALYZING THE
PAST REFERENDUM
DATA

KEY FACTORS
EXAMINED

- Year
- Superintendent
- Project List – New and Renovations/Additions
- Referendum Amount
- Board Approval Vote
- Date of Public Vote
- %YES/NO outcome
- Community Involvement level

2016

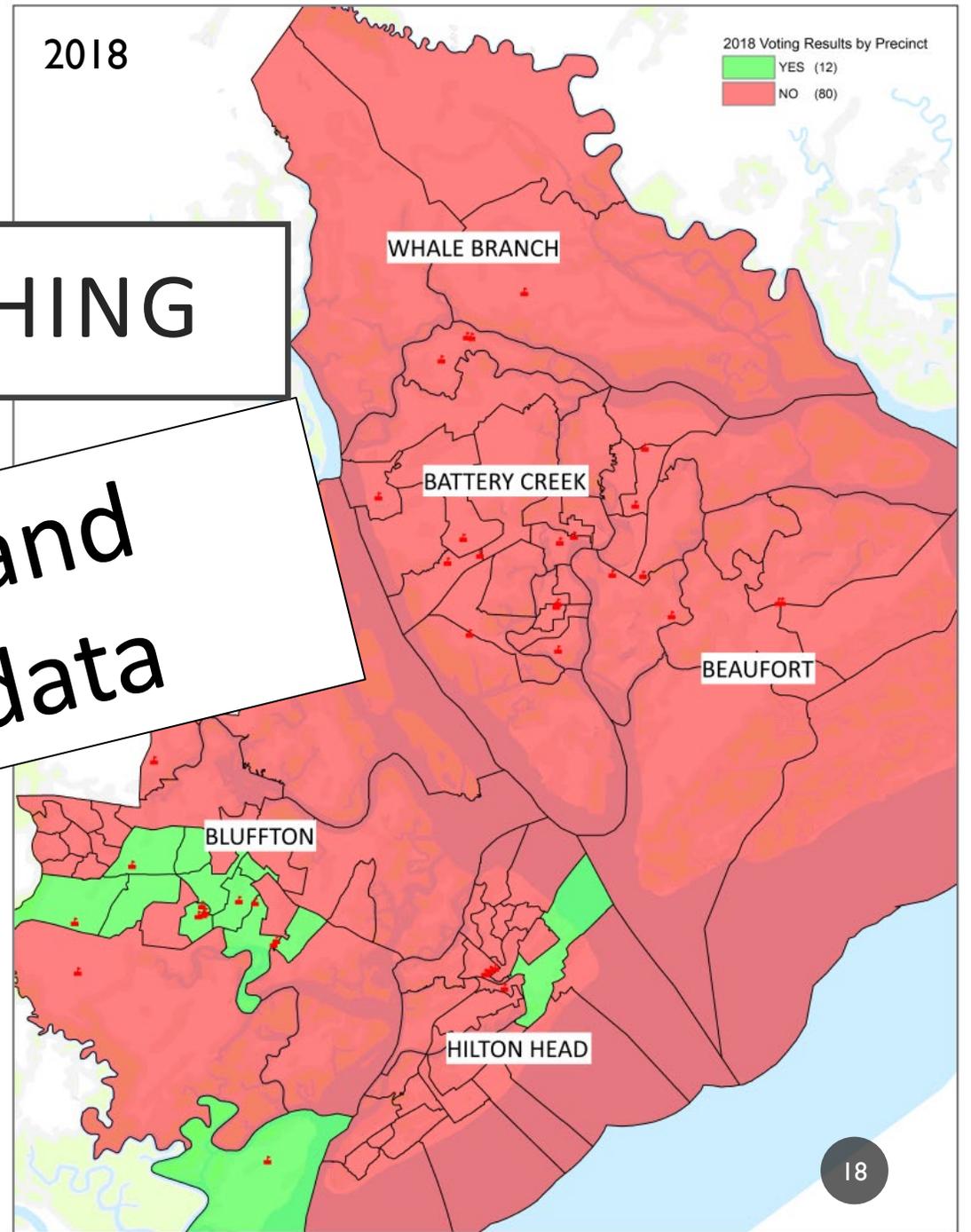
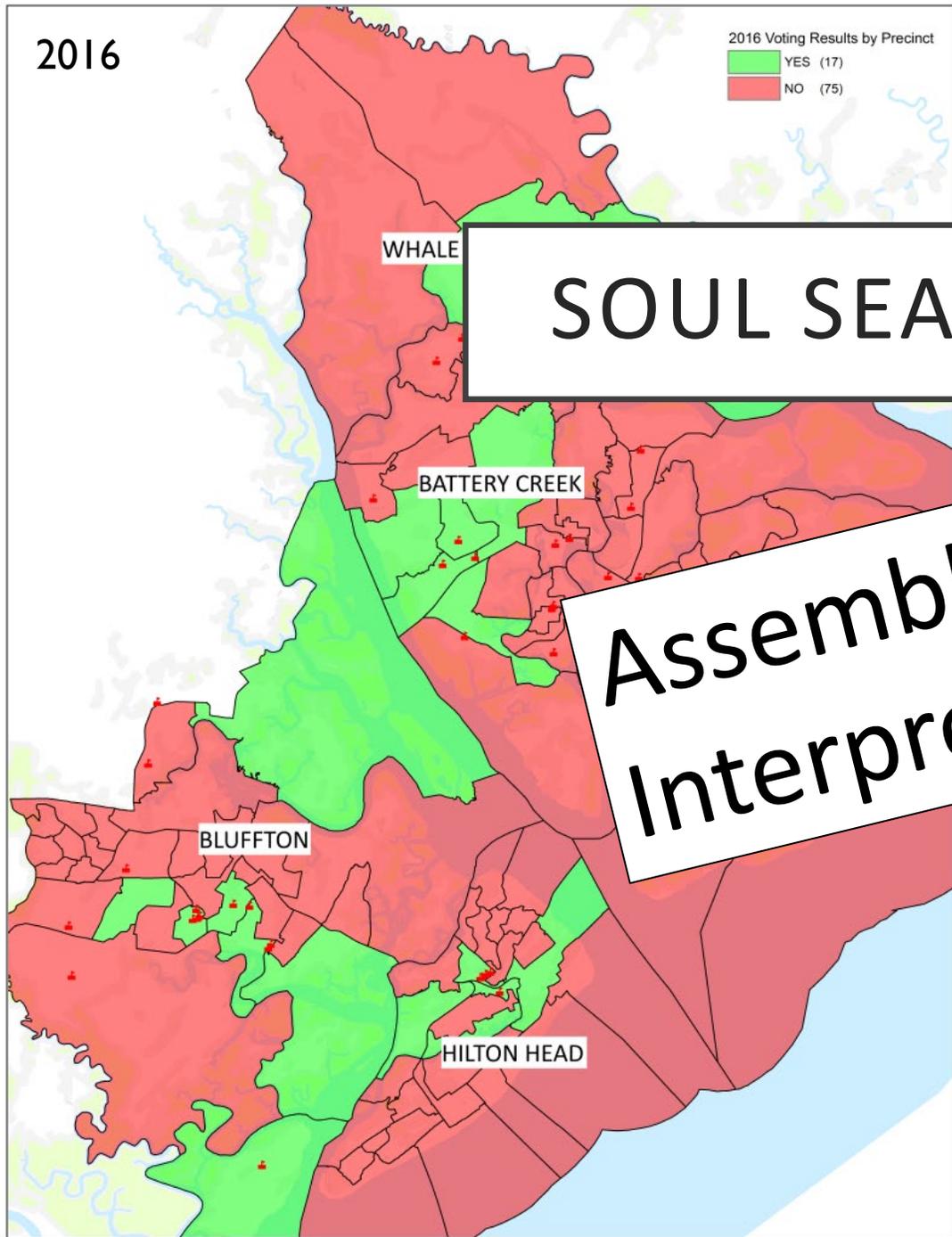
2016 Voting Results by Precinct
YES (17)
NO (75)

2018

2018 Voting Results by Precinct
YES (12)
NO (80)

SOUL SEARCHING

Assemble and Interpret data



YEAR	Supt	Bond Amount in Millions	Citizen involvement at project list development	Board approval/ vote	Date of vote	Yes/No	New Schools	Renovations/ additions
1988	Richard Flynn	\$45	Citizens Task Force	UNK	Tuesday March 22, 1988	Passed	New James J. Davis Elementary	Cafeteria, office and library at Broad River Elementary
SOUL SEARCHING						UNK	New M.C. Riley Elementary	Computer, library and other special spaces at Island Elementary
							New HE McCracken Middle School (now the Hilton Head Middle School)	Cafeteria, library at Hilton Head Elementary
							Replacement of Battery Creek High and renovations to a building for an elementary school.	
1994		\$80		UNK	Tuesday May 24, 1994	Failed	New Beaufort High	
						47% YES	Battery Creek High	
							New Bluffton Middle School	
							New Bluffton Elementary School	
							Hilton Head II Elementary School	
							New Beaufort Middle School (old BHS)	
							New Bluffton Middle School (now HE McCracken Middle)	
							Replacement facility for Beaufort High (new building)	
1995	Shinn	\$122			Tuesday May 23, 1995	Passed	New Gray's Hill Elementary School (now Whale Branch Elementary)	Additions at Broad River, Mossy Oaks, Lady's Island Elementary, Hilton Head High
						55% YES	New MC Riley Elementary School	Mary Fields Elementary expansion (Daufuskie Island)
							New Lady's Island II Elementary School (now Coosa Elementary)	New Beaufort Middle School (from Beaufort High)
							New Bluffton Elementary School	Refurbishing and upgrading at Battery Creek High
							Hilton Head II Elementary School	Technology for new and existing schools
							New Gray's Hill Middle Schools (now Whale Branch Middle)	
							New Bluffton Middle School (now HE McCracken Middle)	
	New Beaufort High							

Assemble and Interpret data

YEAR	Supt	Bond Amount in Millions	Citizen involvement at project list development	Board approval/ vote	Date of vote	Yes/No	New Schools	Renovations/ additions
2000	Hermain Gaither	\$120	public meetings after list d		Saturday March 18, 2000	Passed	construct a new North Area eventually became Whale	Expansions or Renovations at Broad River, Shell Point, ton
						67% YES	construct a new Bluffton-a eventually became Bluffto Construct a new elementa (School) Construct a Hilton Head campus auditorium Construct a District Office/Staff Development Center (never built, but land) infrastructure improvements	
2006	Edna Crews	\$47.70					on-area elementary school (\$16.26 million) (this eventually became Red Cedar Elementary)	purchase land for the North Area High School (\$1.5 million), and finish the North Area High School (\$2.4 million). (Whale Branch Early College High)
							uffton-area middle school (\$23.5 million) (This eventually became Bluffton Middle)	
2008	Valerie Truesdale	\$162.70	Facilities Master Plan		Saturday April 26, 2008	Passed	uffton-area elementary school on Jones Tract (This eventually became Pritchardville Elementary)	Building Additions (Mossy Oaks PE Building, Broad River PE Building, HE McCracken Band and Drama rooms, Beaufort High Performing Arts Center)
			Outside committee that promoted the referendum.			52% YES	Construct a Bluffton- area elementary school on Davis Road Tract (this eventually became River Ridge Academy)	Site New Lady's Island Area Elementary School (Springfield Rd)
			Public Education Sessions				Construct 2 new Bluffton-area early learning centers (Bluffton and MC Riley ECC's)	Site Bluffton Area Elementary – Jones Tract (PVES)
								Site Bluffton Area Middle – New Riverside
								Site Bluffton Area High – New Riverside

SOUL SEARCHING

Assemble and Interpret data

SOUL SEARCHING

IMPACT OF REFERENDUM ON THE TAXPAYER

Referendum Amount	Required Millage	Current Millage	Increase	Rounded Increase
\$200MM	34.5	31.71	2.79	3.00
\$300MM	37	31.71	5.29	5.50
\$400MM	39.5	31.71	7.79	8.00
\$500MM	42.5	31.71	10.79	11.00
\$600MM	44.75	31.71	13.04	13.00

- Assumptions:
1. One referendum with a 5% coupon rate
 2. Includes \$20MM of 8% funds borrowed annual and repaid over 4 years
 3. Plus or minus one mill

Owner Occupied Residences **4%**

Home Value	Taxable Value 4%	Cost per mil	Mill Incr 3	Mill Incr 5.5	Mill Incr 8	Mill Incr 10	Mill Incr 11	Mill Incr 13
\$ 200,000	\$ 8,000	\$ 8	\$ 24	\$ 44	\$ 64	\$ 80	\$ 88	\$ 104
\$ 250,000	\$ 10,000	\$ 10	\$ 30	\$ 55	\$ 80	\$ 100	\$ 110	\$ 130
\$ 288,000	\$ 11,520	\$ 12	\$ 35	\$ 63	\$ 92	\$ 115	\$ 127	\$ 150
\$ 300,000	\$ 12,000	\$ 12	\$ 36	\$ 66	\$ 96	\$ 120	\$ 132	\$ 156
\$ 400,000	\$ 16,000	\$ 16	\$ 48	\$ 88	\$ 128	\$ 160	\$ 176	\$ 208

8 mill increase
on \$300,000
home = \$8 per
month

Motor Vehicles (6%)

Motor Vehicle	Taxable Value 6%	Cost per mil	Mill Incr 3	Mill Incr 5.5	Mill Incr 8	Mill Incr 10	Mill Incr 11	Mill Incr 13
\$ 8,000	\$ 480	\$ 0	\$ 1	\$ 3	\$ 4	\$ 5	\$ 5	\$ 6
\$ 10,000	\$ 600	\$ 1	\$ 2	\$ 3	\$ 5	\$ 6	\$ 7	\$ 8
\$ 20,000	\$ 1,200	\$ 1	\$ 4	\$ 7	\$ 10	\$ 12	\$ 13	\$ 16
\$ 30,000	\$ 1,800	\$ 2	\$ 5	\$ 10	\$ 14	\$ 18	\$ 20	\$ 23
\$ 40,000	\$ 2,400	\$ 2	\$ 7	\$ 13	\$ 19	\$ 24	\$ 26	\$ 31

8 mill increase
on \$20,000
vehicle = \$1
per month

Non-Owner Occupied Residences **6%**

Home Value	Taxable Value 6%	Cost per mil	Mil Incr 3	Mil Incr 5.5	Mil Incr 8	Mil Incr 10	Mil Incr 11	Mil Incr 13
\$ 200,000	\$ 12,000	\$ 12	\$ 36	\$ 66	\$ 96	\$ 120	\$ 132	\$ 156
\$ 250,000	\$ 15,000	\$ 15	\$ 45	\$ 83	\$ 120	\$ 150	\$ 165	\$ 195
\$ 288,000	\$ 17,280	\$ 17	\$ 52	\$ 95	\$ 138	\$ 173	\$ 190	\$ 225
\$ 300,000	\$ 18,000	\$ 18	\$ 54	\$ 99	\$ 144	\$ 180	\$ 198	\$ 234
\$ 400,000	\$ 24,000	\$ 24	\$ 72	\$ 132	\$ 192	\$ 240	\$ 264	\$ 312

SOUL SEARCHING

FINANCIAL IMPACT OF REFERENDUM ON THE TAXPAYER

- Based on a \$400 million referendum
- And average home value of \$300,000
- And average vehicle value of \$20,000



= \$9 per month



HOW DO YOU GAIN THE PUBLIC
TRUST?



~~PUBLIC TRUST~~



Go directly back to
**SOUL
SEARCHING**



Without Public Trust Nothing Can Happen

The Public has to Trust:

- Superintendent
 - Board
 - Staff
 - Staff Documents
- ✓ The Superintendent must be accessible
 - ✓ The Board must function
 - ✓ Staff must have done their homework

WHAT WORKED FOR BCSD

Build a Plan for:

- Board Cohesiveness – staying focused on the long-term needs (KEY!)
- Trust with the community – CITIZENS committees do the hard work
- Listening to concerns through public forums and educating the public on the needs identified at the district level
- Focusing on the local needs – what are the specific needs identified by communities
- Build trust in the needs through community input on the lists of projects to prioritize needs
- Reviewing and prioritizing with the Board of Education

WHAT WORKED FOR BCSD

- An interim superintendent with years of experience with passing bond referendums
- New Superintendent who started with a 3 month "Listen & Learn" tour

WHAT IS A COMMUNITY PROJECT
REVIEW COMMITTEE (CPRC)?

COMMUNITY PROJECT REVIEW COMMITTEES

CPRC 2019

In 2019, interim Superintendent Dr. Berg appointed a committee to make recommendations on facilities projects. This committee reviewed facility condition assessments, heard from safety/security experts, talked with community planners, and visited schools in the district and other school districts.

Putting in over 1500 volunteer hours this CPRC prioritized a list of over \$629M of projects

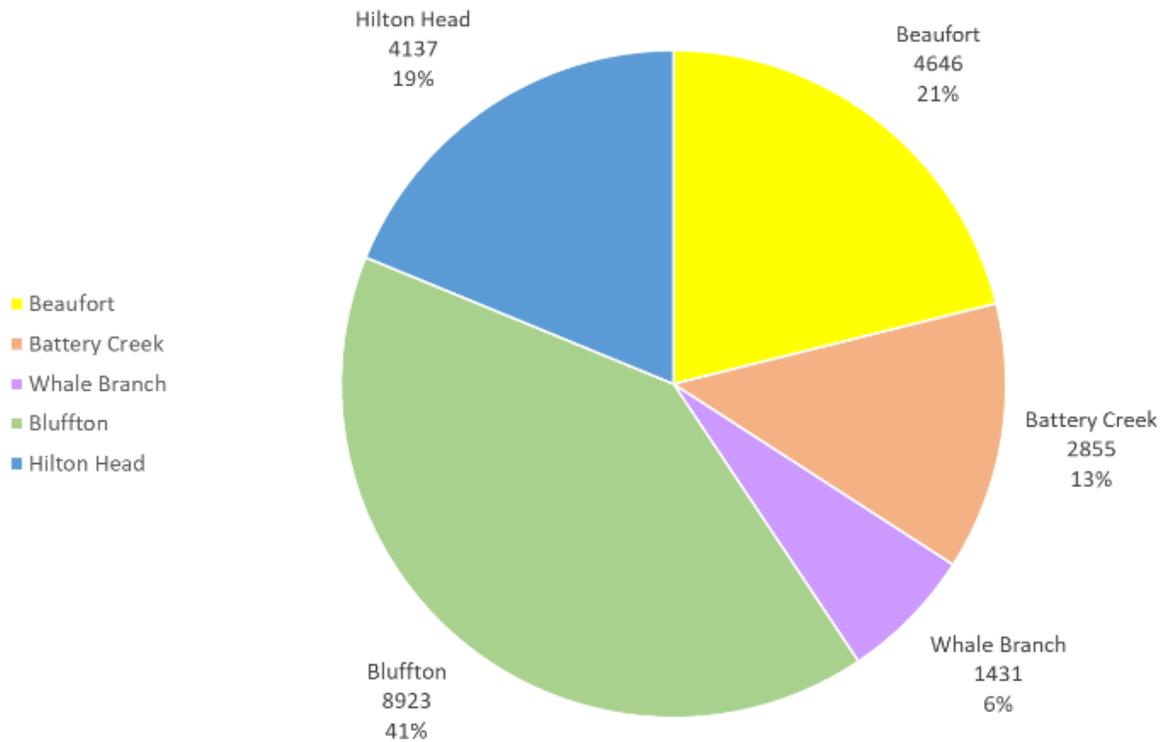
Their recommendations resulted in the \$344M bond referendum in 2019 overwhelming approved by the public with a 69% approval

CPRC 2023

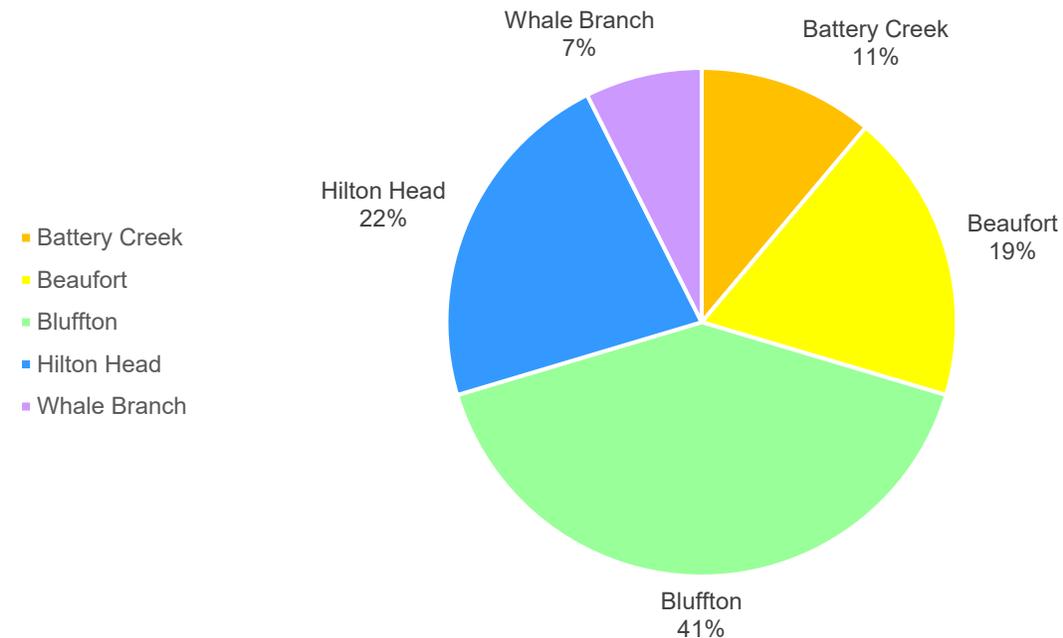
In December 2022, Superintendent Dr. Rodriguez appointed a committee to again make recommendations on facilities projects. This committee reviewed all projects recommended by the previous committee that were not on the final referendum list. They also reviewed the 2022 facility condition assessment results, heard from district staff, Town of Bluffton planning staff, other experts on the potential projects putting in over 900 total volunteer hours, the CPRC 2.0 prioritized a list of over \$980M of projects. Their list resulted in the Board moving forward in a \$439M bond referendum going to voters November 7, 2023 with a 72% approval

CPRC Representation

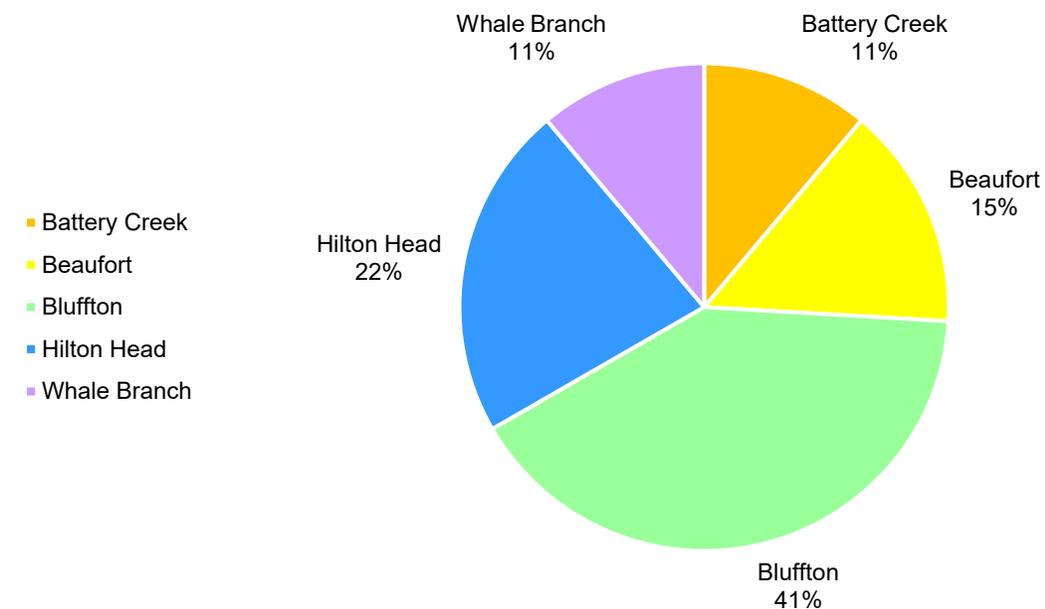
Distribution of students by Cluster in 2018-2019



CPRC Members by Residence Cluster



CPRC Members by Nomination Cluster



CPRC MEETING SUMMARY

Meeting 1- January 28, 2019

- History of Bond Referenda

Meeting 2 – February 4, 2019

- Lexington 2 School Tour
- 10-Yr Enrollment Change
- 8% Debt Capacity
- CIP book

Meeting 3 – February 18, 2019

- Safety Security Assessment

Meeting 4 – February 25, 2019

- CTE
- Facility Condition Reports – HHIMS & HHIHS

Meeting 5 – March 4, 2019

- Facility Condition Reports – BCHS & LIMS

Special Meeting – March 6, 2019

- Demographic Study Report
- Committee Report to the Board

Meeting 6 – March 11, 2019

- Facility Condition Report – Robert Smalls
- Furniture
- Technology
- List Discussion Process

Meeting 7 – March 25, 2019

- Athletic Assessment
- Facility Condition Report – BES
- Riverview Charter School Gym

Meeting 8 – April 1, 2019

- Playgrounds
- Bluffton Area Growth
- BCSD Projections
- Land Needs

Meeting 9 – April 8, 2019

- CTE
- Land
- Prioritize Projects

Meeting 10 – April 22, 2018

- Finalize List items
- Executive Summary

CPRC 2019 SCHOOL TOURS

❖ **Lexington 2 School Tour : Wednesday Jan 30 at 8:00am**

- Robert Smalls International Academy : Friday Feb 1
- Hilton Head Island Middle School : Monday Feb 4 at 10:00am
- Hilton Head Island High School : Monday, Feb. 4 at 11:15am
- River Ridge Academy : Wednesday, Feb. 6 at 8:45am
- May River High School : Thursday, Feb. 7 at 10:30am
- Battery Creek High School : Friday Feb 8 at 9:00am
- Lady's Island Middle School : Wednesday Feb 13 at 9:00am
- Hilton Head Island Elementary : Wednesday Feb 13 1:00pm
- Beaufort Elementary School : Tuesday Feb 19 at 8:30am

❖ **Charleston Co Schools : Wednesday Feb 20 at 8:00am**

- Shanklin Elementary School : Tuesday March 5 at 9:00am
- Broad River Elementary School : Wednesday March 6 at 9am
- Whale Branch Schools : Monday March 11 at 1pm (JJDECC), at 2pm (WBES), 3pm (WBMS) and 4pm (WBECHS)
- Lady's Island Elementary School : Wednesday March 13 at 9:00 am
- St Helena Elementary School : Wednesday March 13 at 10:30 am
- Hilton Head School for Creative Arts : Thursday March 14 (second visit to HHIES as well)
- Beaufort High School : Monday March 20

20 BCSD SCHOOLS
VISITED
2 OTHER SCHOOL
DISTRICTS VISITED

Prioritization Exercise



CPRC LIST PRIORITIZED

1. Safety & Security
2. Replacement schools
3. Additions
4. Renovations
5. Technology infrastructure
6. Cate
7. New school
8. Furniture
9. Athletics
10. Playgrounds
11. Parking lots/drives/sidewalks
12. Riverview gym
13. Land

TOTAL = \$628,615,586

APPROVED BY
BOARD OF
EDUCATION
JUNE 18, 2019

PHASE 1

Funding Request to Voters for \$344,610,000 in 2 Questions:

Question 1 – \$290,555,000 Includes:

- Safety/Security
- Replacement Schools at RSIA
- Additions at MRHS and RRA
- Renovations at BES, BCBS, and HHIMS
- Technology Infrastructure

Question 2 – \$54,055,000 Includes:

- CATE program expansions at BCBS and MRHS
- Renovation Design for HHHS
- Middle School Athletic Improvements at BMS, WBMS, RRA, BLMS, and HEMMS
- High School Athletic Improvements at High Schools district-wide
- Playgrounds improvements at early childhood centers, elementary schools, and PK-8 schools



PHASE 2 REFERENDUM

PHASE 2 Referendum – November 8, 2022
(or November 7, 2023) for remaining items:

- New School in Bluffton
- Lady's Island Middle School Renovations/Replacement (following a community committee tasked with "right-sizing" Northern Beaufort County Schools
- Hilton Head High School Renovations
- CATE Construction
- Parking lots, drives, sidewalks
- Riverview Charter Gym
- Furniture
- Land

WHAT IS A CITIZEN'S LED OVERSIGHT
COMMITTEE (CLOC)?

Building Trust and Accountability Citizen Led Oversight Committee (CLOC)

The CLOC is an independent group of volunteers who monitor all referendum building projects, schedules, budgets and expenditures.

The committee serves as an independent watchdog by monitoring projects and spending and then reporting directly to the public and the Board of Education.



BEAUFORT COUNTY SCHOOL DISTRICT 2019 BOND REFERENDUM CITIZEN-LED OVERSIGHT COMMITTEE (CLOC) 2020 ANNUAL SUMMARY

CLOC MISSION

Independently monitor all building projects, schedules, budgets, and expenditures from the Beaufort County School District's November 2019 Bond Referendum, thereby ensuring proper use of Beaufort County taxpayer funds and superior facilities for Beaufort County students.

❖ CLOC members spent

600 hours reviewing projects

❖ **\$ 35.72** million spent out of \$344 million

❖ **48** projects at **21** schools initiated and remain **ON SCHEDULE** and **ON BUDGET**



❖ **2** projects completed **ON SCHEDULE** and **ON BUDGET** -- May River High School and River Ridge Academy Additions

❖ **2,569** students benefit from completed projects

For more details go to: <https://www.beaufortschools.net/cms/One.aspx?portalId=170925&pageId=23325519>

2019 Bond Referendum – Summary Status of Projects

- Status: ●
- Summary of Project Scope Packages:
 - Planning Phase: 01
 - Design Phase: 00
 - Bid/Award Phase: 01
 - Construction Phase: 23
 - Closeout Phase: 19
 - Completed: 50
 - Sub-Total: 94

2019 Bond Referendum Financial Updates

Financial Update ●

Budget Summary 06/30/24

Beginning Original Budget	\$344,610,000
Bond Premium Board Increase	<u>\$31,100,000</u>
Current Budget	\$375,710,000

Paid and Committed Through 06/30/24 \$374,038,407 (99.56%)

Total Remaining Funds to Commit (Including Contingency) \$1,671,594 (0.44%)

Contingency Activity in June 2024

Savings Returned	\$ 10,000
Contingency Used	\$541,829

Contingency Remaining \$129,105

WHAT ARE SOME LESSONS LEARNED AND
HOW DO YOU THINK YOUR EXPERIENCE
CAN BE REPLICATED IN OTHER SCHOOL
DISTRICTS?

HIRE THE EXPERTISE YOU NEED

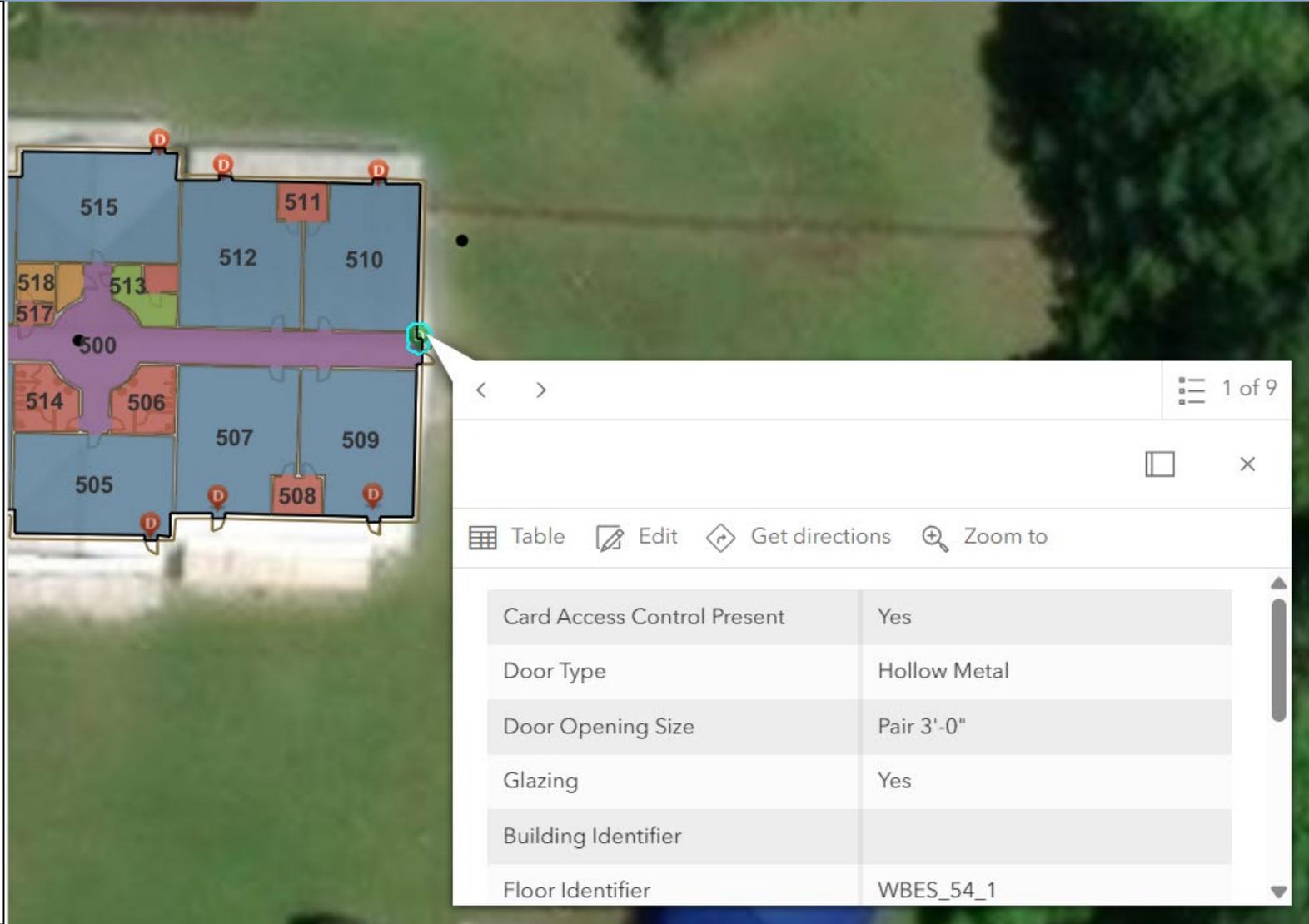
YOU NEED THE
RIGHT AMOUNT
OF OWNER'S
REPRESENTATION

IN THE FIELD AND
IN THE OFFICE



COMPLETE A FACILITY CONDITION ASSESSMENT

- ✓ Mechanical – including HVAC equipment
- ✓ Elevators
- ✓ Electrical / Lighting
- ✓ Doors – interior and exterior
- ✓ Building Envelope
 - ✓ Windows
 - ✓ Exterior Walls
 - ✓ Roofs
- ✓ Floors / Ceilings
- ✓ Plumbing
- ✓ Interior Walls > painting schedule
- ✓ Casework
- ✓ Athletic fields, tennis courts, tracks
- ✓ Playgrounds
- ✓ Cameras, WAPS, etc.



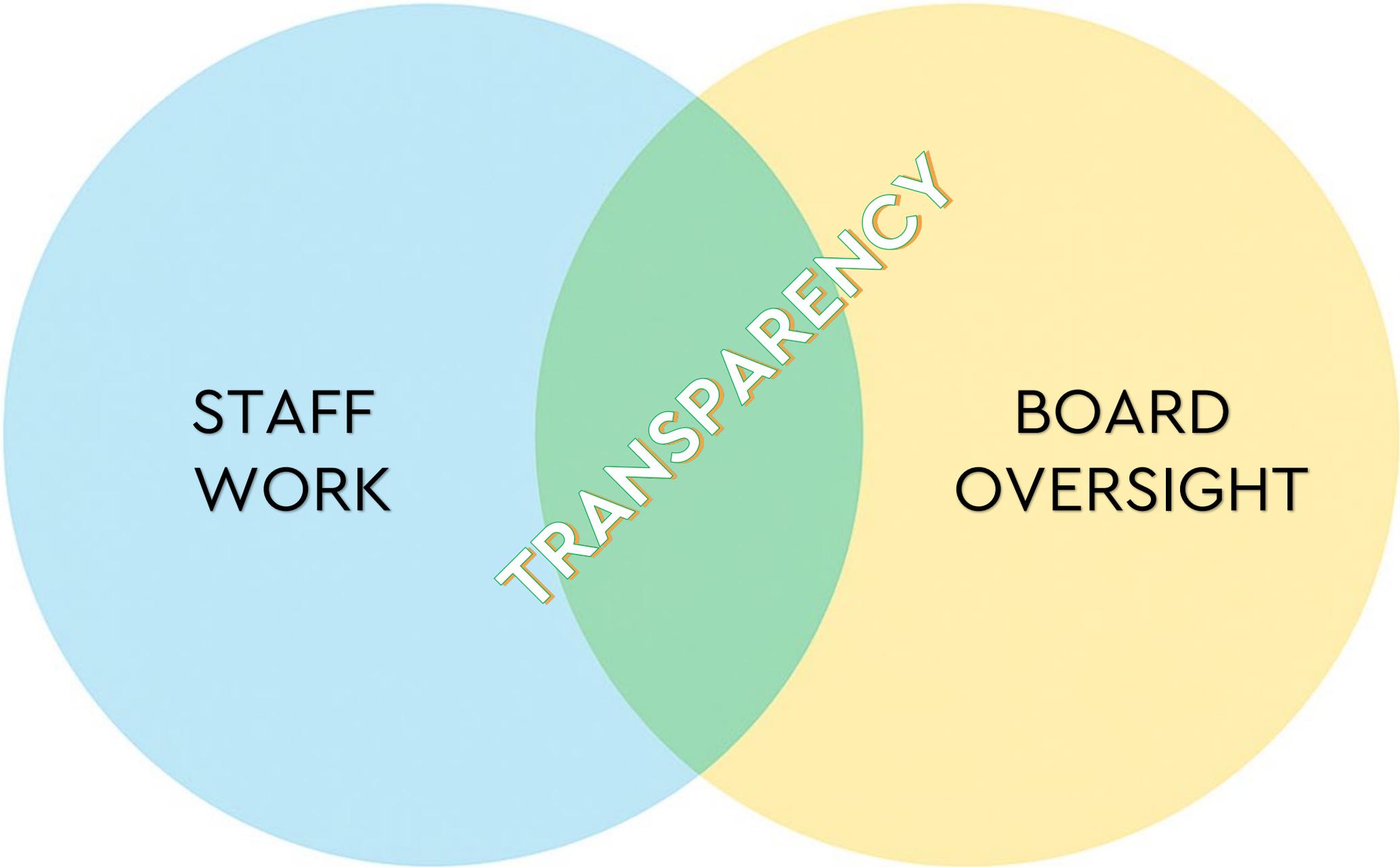
LESSONS LEARNED

We do annual "lessons learned" sessions with:

- Our construction team
- Architects
- Contractors
- CLOC



ACCOUNTABILITY



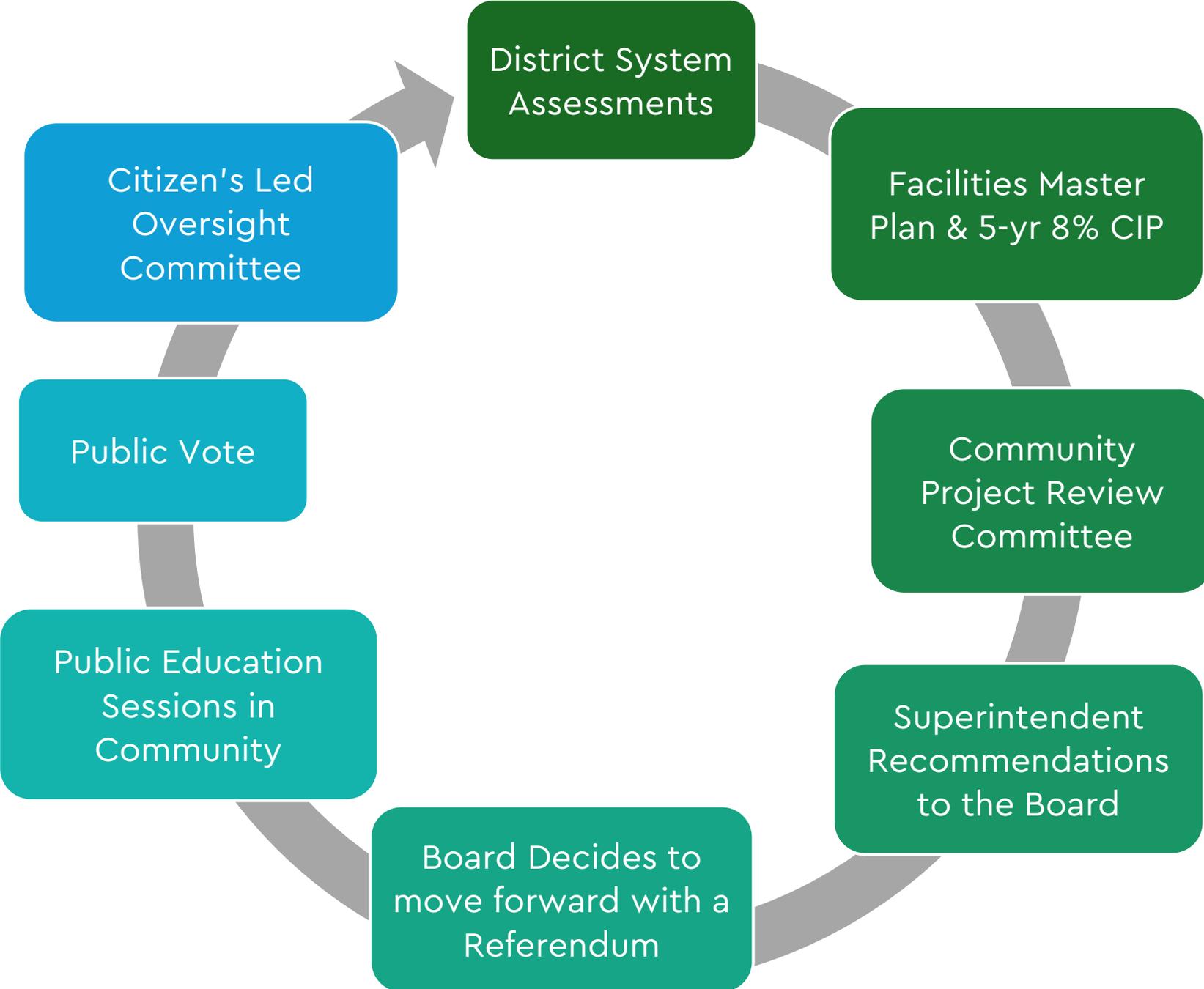
STAFF
WORK

BOARD
OVERSIGHT

TRANSPARENCY



BCSD Referendum Process



QUESTIONS AND CONVERSATIONS