

## Ehlers Schedule of Services for Operating Referendums, 2016

### Standard Services

**Package 1. Basic Services.** Ehlers will provide the following services:

- 1) gather data from the District, the county, and the Department of Education to thoroughly understand the district's referendum authority and its tax impact;
- 2) estimate the revenue, state aid, and additional tax levies that would result from a referendum election, based on up to ten different revenue amounts;
- 3) estimate the impact of the referendum on property taxes for sample parcels of property of varying types and values;
- 4) provide tables which summarize the information described above;
- 5) provide tax rate and tax impact information to District staff and/or legal counsel for inclusion in the resolution calling for the election, the ballot, and the legally required notice to all taxpayers;
- 6) prepare a customized PowerPoint presentation, including an explanation of operating referendums, statewide trends in referendums, and information on the district's proposed referendum; and
- 7) attend one meeting in the district (e.g., a board work session to present information and explain options, or a public meeting to present information on the proposal).

**Package 2. Additional Graphs and Tables.** Ehlers will provide the following services:

- 1) provide three graphs comparing the district to other selected districts, in terms of:
  - a) school property taxes paid in 2016 for two different examples of property value and type (e.g., residential homestead, agricultural homestead, commercial); and
  - b) referendum revenue per pupil unit;
- 2) provide tables showing the amount of additional state property tax refund amounts that taxpayers in the district may receive as a result of the proposed referendum, and the net increase in property taxes.

**Package 3. Property Tax Impact Web Site.** Ehlers will provide the following services:

- 1) set up and maintain a web site providing information on how the proposed referendum will affect taxpayers, including:
  - a. an interactive feature in which property owners can enter the estimated market value of their property and immediately receive an estimate of the annual and monthly tax impact of the referendum; and
  - b. an invitation to contact Ehlers - by e-mail or through a toll-free phone number - with further questions about the tax impact of the referendum; and
- 2) respond promptly to all e-mail and telephone inquiries received from district taxpayers.

### Fee Schedule for Standard Services (Districts may choose any combination of packages)

Package 1	\$1,950
Package 2	\$500
Package 3	\$1,000



## Additional Benchmarking Graphs

In addition to the comparison graphs described above in Package 2, item 1, Ehlers offers a comprehensive “**Benchmarking and Best Practices Service**,” which provides other graphs comparing districts on a wide variety of variables, available for \$50 per graph or \$150 for four graphs. Examples of graphs which may be useful in providing public information on an operating referendum are listed on the following page. For more information on this service, contact any Ehlers municipal advisor or financial specialist.

## Hourly and Additional Services

Ehlers will also provide services related to operating referendums on an hourly basis, in the following circumstances:

- 1) for Districts which have selected one or more of the packages listed above, but request additional services related to the Project, including attendance at additional meetings in the District and provision of additional information not listed under standard services;
- 2) for Districts which request services that are more limited than any of the above packages (e.g., double-checking the District’s estimates of revenue and tax impact, reviewing ballot language, or reviewing public information materials.)

For these services we would charge our regular hourly consulting rate of \$195 per hour for professional services. In addition, Ehlers would be entitled to reimbursement for all out-of-pocket expenses incurred for these services, including the costs of reproduction of documents, delivery services and mileage expenses (one-way only).

**All of the fees described are due and payable to Ehlers after the election, regardless of the outcome of the referendum election.**

### Ehlers Education Team

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Visit Ehlers on the Web: [www.ehlers-inc.com](http://www.ehlers-inc.com)

**Please complete the form on the following page to indicate the package(s) and any additional Benchmarking Graphs that you would like Ehlers to provide. When the form is complete, you may:**

- Scan it and e-mail to [MNSchools@ehlers-inc.com](mailto:MNSchools@ehlers-inc.com)
- Print it and fax to (651) 697-8555.
- Send by mail to Ehlers, 3060 Centre Pointe Drive, Roseville, MN 55113





## Ehlers Operating Referendum Services Form

Contact Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

District Name: \_\_\_\_\_ E-mail address: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

By signing above, you agree to engage Ehlers to provide the services selected below.

### Operating Referendum Packages

- Package 1 (Basic Services) - \$1,950
- Package 2 (Additional Graphs and Tables) - \$500
- Package 3 (Property Tax Impact Web Site) - \$1,000

### Benchmarking Graphs

Some examples of Benchmarking graphs offered by Ehlers are listed below. Graphs are available for **\$50 per graph or \$150 for four graphs**. Data included in the graphs will be the most recent available at the time the graphs are prepared.

- |  |  |
|--|--|
| <input type="checkbox"/> Total School Property Taxes for a Sample Home<br>Market value for the sample home (_____)                                   | <input type="checkbox"/> Allocation of Tax Levy on Sample Home |
| <input type="checkbox"/> Total School Property Taxes for a Sample Agricultural Homestead Property<br>Market value for the sample Ag Property (_____) | <input type="checkbox"/> Referendum Market Value Per Pupil     |
| <input type="checkbox"/> Tax Capacity Per Pupil  | <input type="checkbox"/> General Fund Revenue Per Pupil        |
| <input type="checkbox"/> Operating Ref. Authority per Pupil Unit   | <input type="checkbox"/> General Fund Expenditures Per Pupil   |
| <input type="checkbox"/> Licensed Staffing Ratios  | <input type="checkbox"/> General Fund Expenditures by Program  |
| <input type="checkbox"/> Instructional Cost Per Pupil  | <input type="checkbox"/> Administrative Cost Per Pupil         |
| <input type="checkbox"/> Total General Fund Balance Per Pupil  | <input type="checkbox"/> Debt Service Payment Per Pupil        |
| <input type="checkbox"/> Long Term Debt Per Resident   | <input type="checkbox"/> Square Feet Per Pupil                 |
| <input type="checkbox"/> GRAD and ACT Test Scores  |  |

Identify eight districts to compare with your district and list them below. We can also assist with selecting districts that are comparable in terms of demographic data.

_____	_____
_____	_____
_____	_____
_____	_____

