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ABSTRACT

This review of bond election campaigns in junior college districts indicated that the election has a better chance of success if (1) the voters are told that no tax increase will result from a "yes" vote; (2) the district in question is a going concern at the time of the election; (3) controversy and vocal opposition are avoided; (4) the editorial support of local news media is won; (5) the college leadership seeks personal contact with the community; and (6) a popular site has been selected. While none of these hypotheses was contradicted by the survey's findings, many of the variables the author felt to be particularly important in junior college bond elections had not been mentioned in the literature reviewed here. Some of the conclusions of the study were that the chances for a successful bond election appear to decline as the voter turnout increases, and the strongest support for school bonds comes from parents of children in school and from new residents of the area. The amount of the bonds to be floated has little effect on the election's result, although the question of a tax increase may have significant effect. [Not available in hard copy due to marginal legibility of original document.] (MS)

JUNIOR COLLEGE BOND ELECTIONS:

WHY DO THEY FAIL (OR PASS)?

A Survey of Previous Research into the Variables that Affect the Outcome of Bond Elections.

A Research Paper
for Education 441D
By Wayne Overheck
Submitted
December, 1969

TABLE OF CONTENTS

I. INTRODUCTION

New community junior colleges are being created at a rate of nearly 100 a year, and community college enrollment is increasing at a rate exceeding 200,000 students annually. To cope with this sort of growth, the community colleges must have more revenue for capital outlay purposes within the next few years than they have spent throughout their previous history. However, of the bond elections being called to provide these capital outlay funds, more than half are now failing (II-5:81)

There have, of course, been dramatic stories of new colleges that were voted more than sufficient capital outlay funds by an enlightened community, but growing numbers of new colleges are turning to lease-purchase arrangements and not-so-temporary "temporary" facilities to get their programs started. It is unfortunate, but the community college movement's greatest period of growth since the twenties has coincided with the greatest taxpayers' revolt since the depression.

A few states (most notably Florida) have spared their community colleges the headaches of bond elections and rebellious voters by providing state funds for all capital outlay purposes, but these states are the exceptions. In most of the nation, community college districts must join the public school systems in seeking voter approval of bond issues to build their physical plants.

This paper is dedicated to the goal of providing information that might assist these community college districts in

the very important task of winning bond elections. Very little has heretofore been published regarding junior college bond elections, and this paper is intended to serve as a literature survey preliminary to new empirical research in this field.

PURPOSE AND METHODOLOGY

The primary purpose of this paper, then, is to report what previous students of bond elections have learned--not only about the elections themselves, but about the factors that contribute to their success or failure.

Except for descriptions of bond elections in individual districts, there are virtually no studies of junior college bond elections to be found in the literature--virtually no one has undertaken a broad study of junior college bond elections as such.

The current author wrote one previous seminar paper that summarized the experiences of four California junior college districts that won bond elections after suffering a collective total of eight defeats. The findings of that study (VI-1) will be summarized in this paper, along with some major findings of the rather numerous studies of bond campaigns in elementary and secondary school systems that have been reported in the literature. In addition, the findings of several studies of bond elections in other municipal agencies (e.g. park and library districts) will be summarized.

Thus, this paper will endeavor to summarize the results of an exhaustive search of the literature. It is hoped that this

compilation will in itself be of service to junior college districts contemplating bond elections, but in addition, the author anticipates using this study as a foundation for a future national examination of junior college bond elections. The author's ultimate objective will be to provide some specific guidelines for junior college bond campaigners that have the support of a broad empirical study.

In keeping with the purposes just outlined, the author's methodology for the current study was to search the major sources of information related to bond election campaigns. These sources included the ERIC Research in Education Index, the Education Index (to periodicals), the Dissertation Abstracts, and several published bibliographies on elections and voter behavior. A number of documents listed in the ERIC index were obtained in Xerox hard copy, as were several dissertations that studied school bond elections. Since the primary focus of this paper is the junior college bond election, the files of Junior College Journal were searched at length--with little success. There appear to have been only a couple of articles about bond elections ever published in this periodical, and these articles deal with the specific experiences of individual districts.

The author also obtained the permission of Mr. Abe Kotin, director of educational services for the Los Angeles Times, to borrow the Times Library's entire clipping file on bond elections dating back to 1946. This file was found to contain considerable material relating to the possible reasons for passage and failure of bond elections.

Files of two other newspapers were also used in this study. But in both of these cases, the current author had served as education writer or editor of the newspaper. Consequently, the author's recollections and notes on his experiences in covering junior college bond elections and past interviews with college officials in these communities were better information sources than the clippings themselves. The empirical findings of bond election researchers, the practical experiences of schoolmen and others who directed bond campaigns, and the reports of newsmen and other detached observers were compiled for this paper. The author divided the findings into a number of categories so that related conclusions of various workers in the field could be compared. Where possible, an eclectic conclusion was drawn from the available data.

However, in many cases two studies reached starkly opposite conclusions on a particular issue, as we shall see. In cases where there were no conspicuous flaws in the methodology that led to one of the conflicting conclusions, the author made no attempt to reconcile the conflicts, merely reporting both points of view. An effort was made, however, to compile a set of cumulative conclusions based on those studies which appeared conclusive in their findings.

DEFINITIONS OF TERMS

As they are used in this paper, a number of terms should be defined. They include the following:

*Community college - a tax-supported two-year comprehensive college that is governed and controlled by a local board of trustees which is also responsible for its finances. This definition excludes the community colleges of some states, but the current study is particularly concerned with community colleges that must go to the voters for approval of bond issues for capital outlay purposes. The governing board of such a district may also be responsible for other levels of education without violating our definition.

*Bond election - a local election in which the voters are asked to authorize the issuance of general obligation bonds to finance capital improvements for whatever municipal or school purpose is stipulated. Bond elections called by local agencies other than school boards or for purposes other than school facilities (i.e. park development or library construction) are included for the purposes of this literature survey. Tax rate elections are not included in this definition.

*Bond election campaign - those events and behaviors on the part of both advocates and opponents of a bond issue that comprise the pattern of variables influencing voters. The campaign thus includes all communications activities and campaign strategies.

*Bond election environment - those variables that relate not to the actions of bond advocates and opponents but to the local demographic, fiscal, geographic, and political climate.

The environment thus includes the existing tax rates, demographic character of the area, size of the district, political predispositions of the voters, amount of the proposed bond issue, etc.

*School district - includes all tax-supported school systems which are governed by local trustees and at least partially funded from local taxes. In this paper, this may include city, county, unified, elementary, secondary, union, and all other forms of school district, except for separate junior college districts, which will be labelled as such.

*Going Concern - an organization, typically a community college, which is already operating an educational program, with students, faculty, administrators, and a tangible campus (although that campus may be borrowed, rented, leased, shared, or temporary).

*Influentials - those persons in a community who are recognized by their other residents as the leading citizens of the area. They may not hold a formal office, but unofficially they wield vast influence in local affairs through their contacts and frequently through their business interests.

LIMITATIONS OF THE STUDY

A number of limitations are operative in this study, and these should be noted at this juncture. The first and most important limitation is that this is primarily a survey of previous research: it is an attempt to compile, assemble, and organize

previously established knowledge rather than an attempt to discover new knowledge.

In addition, this is a study specifically of bond election campaigns, and bond election environments. It is a study of the variables that may affect the success of a bond election. It is not a study of all kinds of tax elections--several studies including Witt (IV-19) (HAVE REPORTED) that different campaign behaviors and different environments are operative in tax override rate elections than those operative in bond elections. Nationally the mean yes-vote percentage in tax rate elections is somewhat lower than the yes-vote percentage in bond elections. In the interest of setting reasonable boundaries for our research, we are therefore examining bond elections, not all fiscal elections.

Likewise, this study will make no attempt to encompass the total perspectives of political science (in relation to voter behavior) or mass communications research (in reference to media behavior). The emphasis here will be upon bond campaigns and environments as variables that produce changes in voter behavior, not upon the voter himself. It is the author's intention to view changes in voter reaction (e.g. the percentage of eligible voters casting ballots and the percentage of affirmative votes a bond issue receives) as a function of campaign behavior and environment.

HYPOTHESES

During the previous study of junior college bond elections (VI-1), the author developed a series of conclusions regarding campaign approaches and environmental circumstances. These conclusions represent the basis for the author's hypotheses for the current study. Although it is recognized that hypothesis-testing in the statistical sense will not be possible in a literature search such as this, it is felt that the presence of these hypotheses will provide a starting point for this research. The conclusions developed in the earlier study include:

1) The most decisive factor in convincing the voters who had rejected at least one previous bond issue to endorse a subsequent one is a campaign argument by bond advocates that a yes-vote WILL NOT RAISE TAXES. All eight unsuccessful elections studied lacked this as a major argument in their campaigns, while all four successful campaigns were geared to emphasize this argument.

2) All four junior college districts studied were going concerns when they won bond elections; only one district was a going concern at the time of a defeat.

3) Controversy and vocal opposition were absent from all four successful campaigns; almost all of the defeats were accompanied by dissent from an organized group or community influentials.

4) All four successful bond elections were endorsed unanimously by the local news media; the defeats in three of the four districts were accompanied by less than full support of the press.

5) In three of the four districts, the successful campaigns were marked by far greater personal contact between college officials and the community than were the antecedent unsuccessful campaigns in the same districts.

6) In all four of the districts the site for the new campus had been selected and the educational and building plans were made public prior to the successful elections; in three districts the site had not been selected and the college's plans were neither final nor publicized at the time of the defeat.

Turning these conclusions into hypotheses, we would predict that the chances for passage of a junior college bond election will be improved if:

1) the voters can be told there will be NO tax increase as a result of a yes vote;

2) the district seeking the bond issue is a <u>going concern</u> at the time of the election;

3) controversy and vocal opposition can be avoided;

4) the unanimous editorial support of the local news media can be won;

5) the college leadership seeks personal contact with the community;

6) a popular site has been selected and the community is familiar with educational and building plans.

II. THE FISCAL CONTEXT FOR COMMUNITY COLLEGES

Before we begin our survey of bond election research, a brief summary of fiscal provisions and bond election requirements for community colleges in the various states is appropriate.

Since the public junior college originally evolved from the local high school, most states continue to treat junior colleges as public schools, governed and financed primarily on the local level. There is a growing trend toward separate and autonomous boards of trustees for community colleges, but most states are retaining the concept of local control and a major local effort in financing the community college (I-5).

On the other hand several states have provided for total state control of community colleges, and others have provided for the state to share in or completely finance capital outlay. The Florida plan, for instance, provides for local control of community colleges by county-wide districts, but capital outlay funds are state-provided. The community colleges are state-run and state-funded in several other states, including Alabama, Connecticut, Massachusetts, Rhode Island, and Kentucky (where the junior colleges constitute branches of the state university). Obviously, the current study is of little relevance to these states.

In a few other states, the importance of the bond issue as a capital outlay revenue source is declining. Under the 1965 Illinois Master Plan, for instance, the state provides three-quarters of the cost of capital improvements for community colleges.

In California, the Junior College Construction Act of 1967 (Senate Bill 691) provides for substantial state assistance in junior college capital outlay expenditures. Under this law, each district submits a 10-year plan for development to the state. The state then provides matching funds on a percentage grant basis(i.e. the state pays a higher percentage of the total cost of the project to poor districts), with the local district authorized to levy a special property tax to obtain its share of the costs <u>without a vote of the people</u>.

In practice, California junior college districts appear to be continuing to call bond elections, partially out of fear that levying this special tax for construction without a vote would produce a massive community protest (VI-2). If the local district share of a $3 million building project were obtained by levying a special tax during one fiscal year, for instance, this could easily double the district's total tax rate for that year. Apparently not many presidents and boards have dared to take advantage of the no-vote provision, because bond elections continue to be called at about the same frequency as before this enactment (VI-2).

However, there is another provision of the California junior college taxing law that has been of considerable assistance to new districts seeking voter approval of a bond issue. This is the permissive new-district override, which allows a much higher than normal tax rate on a continuing basis until the voters of the new district pass a bond issue (and for three fiscal years thereafter). This provision has enabled bond advocates in new junior college districts to tell their communities that a yes vote on the bonds will not raise taxes (and may well lower them). As we have seen, this no-tax-increase argument was decisive in all four districts previously studied by the author (VI-1).

VOTING PROVISIONS

Another aspect of the law that varies from state to state

and has some effect on the outcome of bond elections is the provision for voting qualifications and requirements of a simple majority vs. some higher majority for passage of a bond issue. Cooper (III-2) found that, surprisingly, there was no significant difference in the outcome of school bond elections between states with property qualifications for bond voting and states with universal suffrage for bond elections.

But on the other hand, Cooper confirmed the obvious assumption that bond issues do indeed pass less frequently in those states requiring more than a simple majority for passage.

Currently, only four states--California, Missouri, Idaho, and Kentucky--still require a two-thirds majority for school bonds to carry, and these provisions are now being subjected to court tests under the one-vote (one-man) rule of the Supreme Court (see V-1, V-3, V-7, V-13, V-14, etc.). Lower state courts have now overturned the two-thirds rule on this basis in California, Kentucky, and Idaho, and the issue may well be settled by the Supreme Court shortly.

In the meantime, though, the two-thirds rule is a major obstacle for school bond elections on all levels. Of the 175 school bond elections conducted in California during 1967-68, only 79 (less than half) carried with the required two-thirds majority. However, 158 (more than 90 per cent) received at least a simple majority of affirmative votes. As Gipe points out (II-7), 41 junior college bond elections were held in California during the four-year period of 1960-61 through 1963-64,

and only 24 received the required two-thirds majority, but 37 received a simple majority. The damage the two-thirds rule has done to the progress of the community college movement in California should be obvious from this tabulation.

However, while the question of applying one-man, one-vote to school bond elections slowly works its way through the judicial system, bond elections continue to be rejected by the voters, prompting us to look at the campaign and environmental factors that combine to produce these bond defeats.

III. THE LITERATURE ON BOND ELECTIONS

After reading some of what has been written about bond elections in the past few decades, this author began to feel that he had wandered into a vast academic wasteland. A great deal has been written about school bond elections, but there seems to be substantial disagreement about almost every variable that might affect the outcome of a bond election. In fact, there are irreconcilable contradictions among various workers on such key issues as voter turnout, the role of lay citizens committees, and the role of the news media.

Some researchers have concluded that a citizen's advisory committee is virtually useless, a waste of the school administration's time and negatively correlated with success at the polls. But others have reached the opposite conclusion, reporting that such groups are indispensable.

Similarly, one scholar reported that the higher the turnout,

the better the chances for a bond election to pass. But other studies have concluded that a high turnout is a sign of impending disaster. Meanwhile, some students of bond elections contend that the mass media are extremely influential in persuading voters to support bond elections; others contend that the "best press" in the world is of little advantage.

Even worse than these contradictions, some researchers have duplicated the efforts of their predecessors--seeking answers to questions that have already been rather conclusively answered in a given context.

For instance, one doctoral candidate set out to study certain factors affecting a 1966 bond election in one large-city school district. According to his bibliography, this student was aware of an earlier dissertation that studied many of the same factors during another bond election in the same school district. But this candidate failed to mention the major conclusions of the earlier study in his survey of "related findings." He proceeded to repeat much of the work in the earlier dissertation--without reference to this earlier study that he was in fact replicating.

One gets the feeling that the related literature on bond elections is indeed something of an academic wasteland--a wasteland begrudgingly approached by doctoral candidates who quickly retreat to add their own contributions to its vastness.

Moreover, the periodical literature is of little help to the school administrator who wants to find his way through the

underbrush of conflicting conclusions and locate some meaningful advice for an upcoming bond election. Hundreds of articles have been written about bond elections in the education journals, but almost all of them are of the "here's-how-we-did-it-in-Jonesville" variety--they are interesting, but there is no reason to suspect that what worked in Jonesville will work in Smithville.

For the junior college administrator seeking help, the situation is even worse, because very little has been written about junior college bond elections. Even the "here's-how-we-did-it-in-Jonesville" type of advice is largely spread through the AAJC grapevine.

In an effort to meaningfully compile the results of previous research that could be relevant to the student of junior college bond elections, the data in this paper was organized by major issues. By summarizing all available findings about voter turnout, for instance, in one place, the author hoped to produce an eclectic summary from which a useful synthesis could be achieved. Topics to be discussed include findings about voter turnout, demographic variables, the role of lay citizens groups, the role of personal contact between school personnel and the public, the role of the news media, the effects of vocal opposition, timing of the campaign and placement on the calendar, general campaign strategies, general community attitudes toward education, the significance of having cogent arguments in favor of the bond issue, and other factors.

VOTER TURNOUT

Of all the variables affecting the results of local government bond elections, voter turnout has probably been subjected to the most rigorous empirical studies. It is a tangible factor; it is easily quantified, easily defined, and easily measured.

The most extensive study ever conducted of voter turnout is reported in Carter and Savard's Influence of Voter Turnout on School Bond and Tax Elections (IV-8). This federally funded study of elections in 1054 school districts was based on a disproportionate stratified nationwide sample, and encompassed a nine-year period.

Carter and Savard found that the national mean voter turnout in school elections was 36.3 per cent of those eligible, but with a very wide standard deviation. And large districts have the smallest mean turnout by percentage of those eligible, they reported.

They found that the mean turnout was higher at elections that lost, but no simple relationship between turnout and failure exists. They found that more elections failed than succeeded when: large districts attracted turnouts above 30 per cent, medium size districts reached turnouts of 25 per cent (for bonds) and 17 per cent (for tax rates), and when small districts reached turnouts of 23 per cent (bonds) and 14 per cent (tax rates).

However, of large-district elections that drew 60 per cent or higher turnouts, as many passed as failed.

Carter and Savard concluded that those most inclined to support school tax and bond issues were the most likely to vote, but that increasing the turnout still brings more yes voters than no voters even if most yes voters have already cast their ballots. They recommended that school administrators seek to promote a higher turnout among those known to favor the schools. A high turnout is not dangerous if this turnout is selectively built up, they said.

Two of Carter's colleagues at Stanford University, Bush and Deutschmann (IV-7), found that the most pro-school voters were most likely to vote, and that a higher turnout might mean less support, since persons identified as 'no' voters and non-voters were found to have similar attitudes and demographic characteristics.

In another study, Carter and Sutthoff (cited in II-5) supported the Bush-Deutschmann conclusion, suggesting that higher turnout may be a factor causing defeats. They found that most bond elections pass when the turnout is low, and that more fail than pass with a medium turnout. When the turnout is high, no clear pattern can be established, but very few bond elections pass with a turnout above 50 per cent, they concluded.

Boskoff and Ziegler (I-1) agreed, suggesting that the higher the turnout for a bond election, the less the probability of a favorable vote. In addition, a heated controversy, while it increases the voter turnout, will very likely hurt the chances

for a successful bond election, they added.

In an opinion poll of eligible voters in the San Mateo (Calif.) Junior College District, Witt and Pearce found that the persons most favorably inclined toward an upcoming bond election were also the most likely to vote.

Crider's dissertation, based on a study of Mississippi school districts, NOTED that bond elections were most successful when the turnout was low (III-3).

However, other students of bond elections have reached different conclusions as a result of their empirical research. George Beal and his colleagues conducted a massive federally funded study of bond elections in 195 Iowa school districts during the early 1960's (IV-3, IV-4, IV-10, IV-11).

Beal and his staff found that there was no relationship between voter turnout and the success of bond elections. They reported that turnout and success had a correlation coefficient of +.0029, "which is about as near random variance as one can obtain," Beal concluded (IV-3: 17).

However, Murphy (III-12) differs with Carter as well as Beal. In his doctoral study of several hundred California school bond elections, he found that a "normal" turnout rather than a high or low turnout produced the best success rate. He did not, however, define "normal", leaving it up to each respondent in his study to decide whether the turnout in a particular election had been "normal", low, or high. Murphy urged school bond advocates to neither curtail the turnout nor campaign for a high

turnout.

Thoroughly clouding the pattern, Crosswait (III-4) reported in his dissertation that the higher the percentage of eligible voters casting ballots, the better the chances of success for a bond election.

However, the current author is inclined to discount Crosswait's finding in view of the fact that it was based on a study of only eight matched pairs of school bond elections in rural South Dakota. Furthermore, Crosswait refrained from applying any statistical techniques to his findings, in view of the small n.

The question of what factors produce a high turnout has also been examined empirically. In his doctoral study Lieber (III-9) found that the volume of news coverage (i.e. the number of column inches of coverage given to the bond election by local newspapers) was positively correlated with voter turnout.

On the other hand, Beal (IV-3) reported that no kind of communication technique or device appeared to be correlated with voter turnout. And in his dissertation, Turner (III-15) concluded that various campaign techniques have little effect on voter turnout (although in certain cases campaign techniques do affect the percentage of affirmative votes).

As already noted, Boskoff (I-1) says that controversy tends to increase voter turnout.

In attempting to reconcile the various conclusions about the effect of voter turnout on bond elections that we have

just summarized, it seems that the bulk of the literature has tended to suggest that high turnouts are often associated with unusually high failure rates, but that the pattern is not clear.

In the previous study of junior college bond elections, the current author concluded his discussion of the effect of voter turnout thus:

"...if other circumstances are right, a junior college bond election can be carried with a 20 per cent voter turnout--or with a 70 per cent turnout. By the same token, a bond election can fail with a 20 per cent or a 70 per cent turnout....Voter turnout did not appear to be the decisive factor in the bond elections we studied." (VI-1: 50).

The experiences of these junior college districts appears to be typical of all school districts--voter turnout can be regarded as only one of a vast phalanx of interrelated variables which combine to produce bond election victories in some communities and defeats in others.

DEMOGRAPHIC VARIABLES

Like voter turnout, the group of characteristics that together comprise demography have been extensively studied as variables affecting the outcome of bond elections. As in the case of voter turnout, there is substantial disagreement on the role of demography, but there also seems to be some area of agreement.

In Voters and their Schools (I-2), Carter reported a series of findings about the demographic correlates of public school support and non-support. Among other things, he found that the most pro-school voters are those who are young, have children in the public schools, are relatively new in the area, and work in skilled or clerical/sales occupations.

On the other hand, Carter reported that the most hostile voters are young adults without children, longtime residents of the area (who attended school there), and professional or technical workers. Older persons, those with no children, those with children in private schools, and the most highly educated groups were also found to be hostile to the schools.

Carter urged school officials to aim their bond and tax election campaigns at women, because two-thirds of their attempts to persuade their husbands to support school taxes were found to be successful.

In a study of park bond election results, Jamieson (1-6) reached some conclusions that support Carter's findings. Jamieson concluded that young voters tended to be more pro-bonds than older voters. He also reported that Democrats were more favorably disposed to the bonds than Republicans as a group.

King and Freeman (IV-12) found that older, less educated persons, blue collar workers, and those over 50 tended to vote "no" on bonds.

Somewhat to the contrary, Turner (III-15) found that "below average" communities were far ahead of other kinds of communities in their percentages supporting a school bond election, but that low voter turnout in these areas tended to offset this factor. Turner's "average" communities were most hostile to the school bonds, while "above average" communities approached ed the proportion of yes votes coming from the "below average" communities, but with much higher voter turnouts.

In his San Mateo opinion poll, Witt (IV-19) found that persons over 50 years of age with no children under 21 were the most negative in regard to a proposed college bond election. Additionally, he found that professional and white collar workers were much more favorably inclined toward the bond proposal than blue collar workers, housewives, and retired persons. It is interesting to note that we have here a conclusion directly contradicting the findings of both Carter and King in regard to the stance of professional people toward school bonds.

Panas and Stabile (II-14) reported that persons without any children or with children in private schools voiced the most doubts about the public schools of an Ohio city.

However, Dykstra (III-5) studied the relationship between nonpublic school enrollment and the percentage of yes votes in school bond elections for his doctoral dissertation. One of his primary conclusions was that nonpublic school enrollment had no significant effect on the success of public school bond elections.

Nelson (III-13) found that there was an extremely high correlation between persons having children in school and supporting bond elections. Two other writers of doctoral dissertations concurred. Crider (III-3) found that communities which were growing rapidly and had exceptionally high ratios of children to adults were most likely to support school bond elections. Tebbutt (III-14) reported that the age of a voter's children is an extremely important determinant of that person's

voting habits in school bond elections. He also concurred in Carter's finding that new residents are more sympathetic to school bond issues than older persons and longtime residents.

Another dissertation writer, Gott (III-6), found that areas experiencing rapid growth were very likely to pass school bond issues, while areas of declining population were very unlikely to pass a bond issue.

In his study of voting patterns in Cincinnati, Maughn (IV-17) concluded that both the relatively wealthy and those with no children in public schools had a "great tendency" to vote against school finance measures. Homeowners, Roman Catholics, native caucasions, and even voters with unusually large numbers of children were reported to be somewhat opposed to school finance measures. But Maughn said renters, the relatively poor, and groups particularly dependent on public schools tended to support school finance elections. The strongest support for school tax elections came from those owning no property, Jewish persons, Negroes, foreign-born voters, persons living in densely populated portions of the city, and persons who were widowed or divorced, according to Maughn's research.

In still another dissertation, Smith (IV-19) reported that census tracts with less than 200 professional, semi-professional and managerial persons per 1000 persons over 25 supported school bonds more strongly than tracts with higher proportions of professional people.

Smith found that there was a positive correlation between having completed a grade school education and supporting school bonds, but a negative correlation between having a high school education and supporting school bonds. College education was also found to be negatively correlated with bond support.

Smith reported that areas with relatively low rental rates tended to support school bonds more strongly than higher-rent districts. Smith also noted that areas with high proportions of older adults were particularly hostile to school bond proposals.

Concluding, Smith urged school administrators to focus their campaigns in lower socio-economic neighborhoods where there is substantial latent support for school bonds but few registered voters. He said the key to a bond victory would lie in getting more lower-class voters registered and out to the polls.

A radically different point of view on the role of demographic characteristics in influencing bond elections comes from Beal's large study of Iowa school districts. Beal (IV-3) concluded that there is NO SIGNIFICANT RELATIONSHIP BETWEEN THE PERCENTAGE OF YES VOTES IN A BOND ELECTION AND THE DEMOGRAPHIC CHARACTER OF THE DISTRICT!!! Beal also said his study revealed no significant relationship between the size of the district and bond success rates, a conclusion supported by both Dykstra (III-5) and Crider (III-3).

In concluding that demographic factors have no significant effect on bond elections, Beal stands alone among all of

studies cited. But Beal's methodology and approach are unimpeachable, so his conclusions must be accepted at face value, at least for the state of Iowa.

Thus, we have again encountered such a divergence of views that a broad systhesis is difficult.

Nevertheless, several areas of agreement do appear to exist. Virtually all researchers have concurred that the strongest support for school bonds comes from the parents of children in the public schools and FROM newcomers to the community, and that the strongest opposition comes from persons with no children in the public schools and from older persons.

But we cannot reach a definitive conclusion about the relationship between socio-economic status and support for school bonds. Nor can we even say with certainty that demographic characteristics actually affect the outcome of school elections. Many researchers have said that socio-economic status of the community does affect the outcome of a bond election--although there is great disagreement about precisely which socio-economic classes are most supportive of school bonds. However, one of the most exhaustive studies of bond elections reported in the literature--Beal's--found no such relationship between class and bond success.

Once again, we find ourselves in the position of concluding that demographic factors are insufficient to explain the outcome of bond elections. It remains apparent that bond election outcome is a product of a complex combination of

variables, one of which may or may not be demography.

THE ROLE OF LAY CITIZENS GROUPS

The value of lay citizens' advisory groups in planning and campaigning for bond elections is assumed a priori by a great many school administrators--and by the authors of most "how-we-did-it-in-Jonesville" type journal articles as well. However, the empirical research is by no means conclusive in its support of the practice of using lay citizens' groups.

The current author located no less than 15 sources in the recent literature that advocated the use of citizens' groups to aid the board and administration in determining school facility needs and to assist in or actually run the campaign. Indeed, it is fashionable to advocate a bond campaign completely run by such a group, with the elected board and administration remaining thoroughly in the background.

Among the authors who advocated the use of citizens' advisory committees are Seagers (III-18), Lindahl (IV-13), the Texas Education Agency (IV-18), Bryant (II-2), Hinckley (II-11), B. Carter (II-3), Thompson (II-16), McDaniel (III-10), Herman (III-16), Turner (III-15), Crosswait (III-4), Bennett (cited in II-5), Murphy (III-12), and Mitchell (III-11).

Of the authors just cited, several reached conclusions regarding citizens' committees that merit special mention at this point. In his dissertation, Seagers concluded that "the cooperative effort of a citizens' committee was the key factor in informing the people, thereby gaining their support." (III-18:277)

Bryant agreed: "Birmingham (Mich.) schoolmen attribute their success to many factors but the most important of these can be summed up in just two words: citizen involvement." (He then explained how citizens' advisory groups were thoroughly involved in every phase of a successful bond campaign). (II-2:41)

In his dissertation, Herman reached three major conclusions about factors that contributed to the success of bond elections--and one of the three was that "greater involvement of lay people in school planning (occurred) where elections were favorably voted."

Another dissertation writer, Crosswait, agreed, reporting that he found citizens advisory committees to be helpful, <u>particularly if they actually did the building planning</u>. Three more writers--Turner, Mitchell, and Murphy--all support this conclusion.

However, several other doctoral candidates and the authors of the Iowa studies reached conclusions that tend to controvert the traditional assumption that a lay citizens' group is desirable in a bond election.

Beal (IV-3) asked 195 Iowa superintendents for their opinions of citizens' advisory committees. His resulting distribution of responses was <u>bimodal</u>: 38 per cent felt citizens' committees were "useless", while 43.5 per cent said they were "very useful."

In another portion of the same study, Beal correlated the use of citizens' committees with bond election victories--<u>and got</u>

a negative correlation. He found that citizens' committees had been employed in 61 per cent of the unsuccessful bond elections, but in only 43 per cent of the successful elections.

Reporting another aspect of the same Iowa study, Hartman (IV-11) concluded that superintendents regarded facility planning that involved only the staff and board to be superior to planning involving a citizens group. He found that involving a large group of persons in the planning did not increase the affirmative vote!

In his dissertation, Gott (III-6) reached a conclusion that tends to support the Iowa workers. He reported that the use of citizens committees did not appear to have any affect on the outcome of bond elections.

Another dissertation writer, Nelson (III-13), reported that Arkansas school officials did not regard lay group involvement in bond elections as particularly important.

In summary, we have once again encountered conflicting conclusions in the published literature. Most authors, including the writers of several dissertations, regard citizens' committees as essential and very helpful, but other dissertation writers and the authors of a large-scale federal study reached roughly the opposite conclusions.

The question of employing Parent-Teacher Associations in bond campaigns has also received some attention in the literature--with more consistent conclusions.

Beal's Iowa study concluded that bond election success was positively correlated with superintendents' responses that

the local P-TA had played a major role in the campaign.

Turner studied several kinds of campaign techniques in his doctoral research, including the P-TA march. He found that the P-TA march significantly increased the positive vote in "above average" communities--but not in other neighborhoods.

Hall (II-8) credited the local P-TA for much of the success of an Evanston (Ill.) bond election, and Shields (II-15) reported that the P-TA was effective in a successful San Mateo (Calif.) bond election.

THE ROLE OF PERSONAL CONTACT

A number of bond election researchers have emphasized the importance of personal contacts between school personnel and the community. Most authors have felt these personal contacts were important and helpful, but once again there are authors who disagree, arguing that personal contacts are not a useful technique.

Carter (I-2) reported that the best and most important form of communication between schools and communities is through personal contact. He found that voters preferred to hear directly from school officials, but rarely had this opportunity. Thus, he urged school systems to mount sustained efforts to build personal contacts between school personnel (particularly teachers and administrators) and the general public.

However, he cautioned that "There is nothing to indicate that communications have any lasting effect on attitudes, other than to reinforce those already held. (I-2: 21)

Turner (III-15) agreed, reporting that 57 per cent of all communication relating to a school bond election occurred through personal contact of school bond advocates with neighbors, friends, relatives, and co-workers. Turner also suggested that deep-seated attitudes cannot be changed through such contacts, so it is best to direct bond issue communications to known supporters of the schools.

A number of authors have advocated the use of campaign techniques that take advantage of the principles outlined by Carter and Turner. One of the most frequently offered suggestions is that pro-school voters be identified through initial contacts, and that file cards then be prepared so these pro-school voters (and only pro-school voters) can be called back on election day and reminded to vote.

Among the authors recommending techniques of this sort are Shields (II-15), Anderson (IV-2), Hall (II-8), B. Carter (II-3) and Panas (II-14).

However, other authors have questioned this sort of approach. Beal (IV-3) reported that no communication technique (including the use of the news media and personal contacts) appeared to have any significant correlation with the percentage of yes votes.

Bennett (cited in II-5) reported that personal contact was found to be the most <u>unsuccessful</u> method of eliciting affirmative votes.

A related issue is the use of small-group meetings at

which a school bond advocate appears and presents the case for the bond election. This is another traditional and widely revered campaign technique that many authors advocate.

However, Turner found that small-group meetings were an effective campaign technique only in "average" communities, and Tebbutt (III-14) warned against the use of this technique at all on the grounds that such meetings are not an effective way to reach hostile voters.

On the other hand, Beal found that significantly more superintendents in bond-winning districts than in bond-losing districts rated meetings as particularly important campaign techniques.

Once again, then, we find ourselves unable to draw an eclectic conclusion that does not contradict some of the available evidence. Most authors think personal contact and group meetings are worthwhile, but agreement on this point is not universal.

THE ROLE OF THE NEWS MEDIA

One more area where there is some disagreement is the role of the mass media in a bond election campaign.

Carter (I-2) referred to the news media as a "prime contact" between schools and their communities, and Crider (III-3) found that preplanned use of the mass media was associated with victory in bond elections. Turner (III-15) urged school bond advocates to appreciate the importance of the mass media, and Mitchell (III-11) reported that the news media were

highly influential in the outcome of bond elections.

Roper (IV-16) reported that a metropolitan daily newspaper was <u>the</u> most important potential influence on voters in any future West Valley Junior College District bond election. Panas (II-14) said the newspapers were the best medium for a Cuyahoga Falls (Ohio) bond election.

In the Iowa studies, Beal (IV-3) found that significantly more superintendents who had won bond elections than superintendents who had lost reported a "favorable press." Further, he found that winning superintendents rated the newspapers more important in the campaigns than losing superintendents. However, he also found that letter-to-the-editor campaigns were negatively correlated with success in a bond election.

Lieber (III-9) reported that newspaper editorial endorsements of bond elections were indicators of higher affirmative percentages at the polls.

However, Maughn's dissertation (III-17) concluded that the news media were of little value to school bond elections, because their circulation was primarily among persons who had already made up their minds. Schools cannot reach the undecided persons in the lower socio-economic strata through the news media, Maughn said.

In a related area, a great many authors have urged those who would win school bond elections to develop public relations and communications programs on a continuing basis--not just at election time. A widely expressed view is that if the

school system communicates effectively through the news media on a routine basis, there will not be a crisis at election time. Crider (III-3) found that school districts winning bond elections had such public relations programs more often than districts that lost.

Among the authors urging such a continuing program of community information are Davidoff (II-20), C. B. Hanson (II-9), Hinckley (II-11), McDaniel (III-10), Lindahl (IV-13), B. Carter (II-3), Mitchell (III-12), Murphy (III-12), and Gott (III-6). Gott's dissertation concluded that successful districts (i.e. bond election winners) more often employed a public relations man than unsuccessful districts.

In regard to campaign communications of other types than the news media, opinion is divided. A number of practitioners advocate the massive use of bumper stickers, pamphlets, direct mail, students, billboards, etc. However, Beal (IV-3) reported that no communications technique except newspaper publicity correlated significantly with success at the polls. In fact, Beal found that some of the other media correlated significantly with bond election defeats!!!

Perhaps a relevant viewpoint to cite again at this point is Carter's conclusion (1-2) that communications only tend to reinforce existing attitudes, not change voters' attitudes.

In concluding this section, we can summarize by declaring that the importance of the news media in winning bond elections has been fairly well established, although not all authors agree that the media have an important role to play. In addition, we

have seen that a continuing effort to communicate the schools' needs and activities is correlated with success in bond elections, and that the effectiveness of such communications techniques as billboards and bumper stickers has not been established.

VOCAL OPPOSITION AND THE ROLE OF COMMUNITY INFLUENTIALS

One area in which the conclusions of the authors have been fairly unanimous is the role of vocal opposition--every one agrees that it is bad. And bond election researchers are equally unanimous in their view of community influentials--the schools need their support.

Nelson (III-13) reported the highest correlation coefficient on his entire study in this area. He found very high negative correlation between vocal opposition groups and success in winning bond elections.

Crider (III-3) reported that all forms of overt opposition hurt bond elections' chances, but that opposition from Parent-Teacher Associations, members of county boards of supervisors, and school board members is most damaging. An interesting footnote to Crider's study in this area is his finding that organized Negro support for school bonds was damaging to the bond issue's chances for passage. (Crider's study was conducted in Mississippi).

Gott (III-6) agreed that overt [illegible] threat to bond elections, and has often contributed to defeat of school bond proposals in Kentucky.

Bennett (cited in II-5) reported that unanimous support in the community is necessary if a bond election is to pass.

Several authors (Lindahl, B. Carter, Thompson, etc.) have urged bond advocates to plan for opposition, work to offset and neutralize it, and, particularly, to avoid debating with bond opponents. Such debates are often reported by the local media and result in anti-bond arguments appearing in print when they might not otherwise be covered in the press.

The importance of gaining the support of community influentials and the local power structure has been emphasized by several authors. Perhaps the key study of this area is in Blome's doctoral dissertation (II-1). Blome studied school districts that lost one bond election but won on a subsequent attempt. He found that the support of the local power structure was of major importance in winning.

Blome reported that pro-bond influentials tended to be well educated, wealthy, protestant, business and professional people who were not extremely longtime residents of their communities. On the other hand, anti-bond influentials tended to have much lower incomes, be natives of the community (i.e. residents of 40 years or longer), and be poorly educated, but to own great amounts of land.

Blome found that the change in result from the unsuccessful bond elections he studied to the subsequent successful ones was not due to a realignment of influentials, but instead due

to greater active participation by them. He quoted one community influential as saying: "We let the superintendent and board try to pass the bond issue twice. Finally we said if they stayed in the background we would promote a winning bond election--we did!" (II-13).

Blome reported that all bond elections in his study not supported by community influentials were defeated. Significantly, only one of 10 school board members was found to personally qualify as an influential, and no school teacher was found to be an influential in any community.

Lindahl (IV-13), in a study of library bond elections, suggested that bond advocates approach the local power structure and gain its support before launching a campaign.

Bennett (cited in II-5) reported that half of the bond failures he studied were accompanied by fair or poor civic support. A number of other authors also found community power structure support to be important, including C. B. Hanson (II-9), Cooper (II-4), Gott (III-6), Mitchell (III-11), and McDaniel (III-10).

In summary, we have found general agreement that any kind of vocal or organized opposition to a bond election is a likely omen of defeat, and that securing the support of community influentials is of paramount importance if a bond election is to win.

ELECTION TIMING AND CALENDAR PLACEMENT

A number of researchers have addressed themselves to such

questions as ——————————→ the best times for bond elections, and the optimum length for a campaign. Unfortunately, this is another area where a general consensus is lacking on several points.

In the Iowa studies, Beal (IV-3) found that the month in which bond elections were held had no relationship to their chances of succeeding.

However, Beal's study stands alone in this conclusion: virtually everyone else who has studied the question has said some months are more suitable (but alas, there are several different "best"months suggested in the literature).

Crider (III-3) reported that September and October are the best months for school bond elections, while April and December are particularly bad.

Seagers (III-18), Turner (III-15), and Crosswait (III-4) all simply state that the election should be held during the school year.

Bennett (cited in II-5) advances September, October, and November as the best months for school bond elections. Mitchell (III-11) says February is the best month, followed by January and September (but he cautions against a summertime bond election or a bond election scheduled near any tax deadline date).

Murphy (III-12) reports that October and February are the best months.

Attempting to average these conclusions, we must conclude that February and October are good months for bond elections, but that January, September, and November are also

suitable. On the other hand, no one has advocated conducting school bond elections during the summer: school is out then, many families are away on vacations, and effective campaign groups such as teachers and the P-TA are unavailable.

The question of how long a campaign to conduct has elicited an even wider variety of responses than the question of calendar placement.

Beal (IV-3) found that there was a correlation between starting the flow of news releases six months early and election success (47 districts in his study did this; 43 of them won).

C. B. Hanson (II-9) urged school districts to begin campaigning at least eight months before the scheduled election date, and Hinckley (II-11) recommended an effort as much as 2½ years before the election! Hall (II-8) reported that Evanston (Ill.) began planning five years ahead.

But on the other hand, Gott (III-6) found no difference in success rates between districts that had conducted long campaigns and districts that only ran short ones. And Murphy (III-12) concluded that a campaign of only two to four weeks is most effective (although the campaign should be preceded by several months of planning). The literature also contains several other accounts of how individual districts launched very brief but intense campaigns and enjoyed success.

Given these varying conclusions, it seems unfeasible to search for a consensus or a majority view on the length-of-campaign question--because there simply isn't any consensus.

This is another of the many bond election variables that has yet to be subjected to a sufficiently rigorous study for definitive answers to be produced.

THE ROLE OF FACTUAL DATA IN THE CAMPAIGN

Another of the major questions school administrators have long asked (and have yet to see answered) relates to the place of cogent arguments and factual information in a campaign. Should the voters be told specifically what the money is to be used for? Should the need be demonstrated to the voters?

Beal (IV-3) found no correlation between telling the voters specifically what a bond issue would be used for and winning the bond election. But McDaniel (III-10) found that many voters wanted to know the detailed facts about proposed bond issues.

Bennett (cited in II-5), in contrast, urged school bond campaigners not to confuse the voters with many details, and Maughn (III-17) concluded that cogent reasoning does not move the voters--but emotions do.

C. B. Hanson (II-9), meanwhile, has urged school bond campaigners to get all details of a bond issue out to the people, and Haring (quoted in V-17) blamed the failure of bond elections largely on the lack of clear information given to the public about school finance.

However, several periodical authors have urged bond campaigners to avoid discussing finances, buildings, and physical details in favor of an emphasis on children and learning.

GENERAL COMMUNITY ATTITUDES TOWARD EDUCATION

Several authors have alluded to the existence of general predispositions in favor of or against school bonds in certain communities. There appear to be certain communities that, for reasons that are not necessarily linked to demography and are by no means clear, tend to be particularly pro-education or anti-education.

Beal (IV-3) took note of such communities in the Iowa study, reporting that a community norm for "progressiveness" in passing bond issues was operative in some places. Beal reported that districts having passed one bond election were significantly more likely to succeed in passing another bond election within the five-year period his study encompassed. Similarly, districts that lost once were more likely to lose again within five years, Beal found.

Crider (III-3) also observed this phenomenon in Mississippi, where certain districts appeared willing to vote higher taxes, approve more bond issues, and allocate more funds per child than other surrounding districts.

Likewise, C. B. Hanson (II-9) suggested that there were particularly anti-education districts: "In some school systems, about all you can do is take an aspirin and wait for the voter climate to change." (II-9:67)

However, Murphy (III-12) tended to contradict the studies just cited, particularly Beal. Murphy found that in most instances a school district that lost a bond election on the first

attempt would then be successful on the second try.

Once again, we find that an eclectic conclusion cannot be drawn from the literature, although it does seem probable that some sort of general community norm for education is indeed operative in certain school districts.

MISCELLANEOUS CAMPAIGN STRATEGIES

Much has been written about campaign strategies for bond elections, and a good deal of this material does not logically fit into any of the previous categories. Thus, information on several topics related to campaign tactics will be summarized here.

Two authors have considered the question of bringing in outside consultants in a bond campaign. Beal (IV-3) reported no evidence that the presence of outside consultants was associated with success at the polls. In fact, such consultants were more often employed in unsuccessful campaigns, he noted.

Crosswait (III-4) however, reported a significant improvement in the affirmative vote for districts that employed outside consultants.

Several periodical authors urged bond campaigners to avoid "making threats" to the community, because it is often unfeasible to carry out such threats if a bond election fails.

At least six authors have urged school districts to employ polling before launching a bond campaign, in an effort to identify specific objections to school policies and practices that may exist. Several writers described local polls they had

conducted that identified such grievances and led to reform within the schools preceding a successful bond election.

However, Gott (III-6) found opinion polling to be of no value to the superintendents in his study.

Another commonly espoused campaign technique is to run a selective get-out-the-vote drive on election day. A number of writers reported the effective use of this technique in individual elections, although Beal (IV-3) reported that this technique was not associated with any significant difference in election results. In fact, Beal found that the technique of providing transportation to the polls was used significantly more often in unsuccessful bond elections than in successful ones!

However, Davidoff (II-20) attributed much of the success of a Compton College (Calif.) bond election to a massive effort by students to call registered voters on election day, offering them transportation or baby-sitting services. Apparently the students worked directly from registered voter lists, despite the previously cited conclusion that only those voters known to favor the bond election should be contacted on election day.

FEAR OF A TAX INCREASE

Several studies of bond elections have focused on the specific fiscal and tax issues raised in individual campaigns, attempting to relate the size of a proposed tax increase or the total amount of a bond issue to election success.

In the current author's previous study of junior college bond elections (VI-1), the argument that passage of the bonds

would not increase taxes appeared to be one of the key factors in the eventual successes of all four districts' bond elections.

However, Beal (IV-3) reported little association among the amount of a proposed tax increase, the total amount of a bond election, and success. "Economic relationships did not differ significantly between successful and unsuccessful districts. The total amount of the bond issue, existing millage rates, millage increases and the dollar valuation per student were not statistically different when successful and unsuccessful issues were compared," Beal's study concluded. (IV-3: A-9)

Dykstra (III-5) also found evidence to indicate that the total amount of an issue, a possible increase, assessed wealth, and success do not correlate. However, Gott (III-6) cited fear of added taxes as a cause of the defeat of bond issues, but he too concluded that the total tax rate had no significant effect on the outcome of a bond election.

Hicks (III-7) devoted his entire dissertation to a study of the relationship between fiscal variables and bond election outcome--and he concluded that fiscal variables cannot adequately predict or explain election outcome.

IV. CONCLUSIONS

As noted at the outset of this literature survey, much of the previous research on bond elections is contradictory and confusing. We have endeavored to summarize the major findings of previous workers in regard to a number of variables that have been regarded as important in bond elections. Inasmuch as the

findings related to many of these variables are inconclusive or inconsistent, an eclectic sythesis of the literature is not possible at this time.

However, a number of conclusions would appear to emerge from this survey, including the following:

1. The chances for a successful bond election appear to decline as the turnout increases, although the pattern is by no means clear and the correlation between high turnout and election failure is not great.

2. There is general agreement that the strongest support for school bonds comes from the parents of children in school, and particularly from new residents of the area. Opposition appears strongest among older persons and those with no children or children in private schools. Beyond this, the relationship between demography and bond election support, if any, is by no means clear.

3. Lay citizens groups are regarded as very important to the success of bond elections by some authors, but not by other authors who have conducted equally rigorous research.

4. Most students of bond elections have concluded that personal contact between school staff and the community is particularly important, but there is disagreement on this point as well.

5. Most authors reported that the news media play an exceptionally important role in bond elections, but there is also disagreement here.

6. There is general agreement that any kind of vocal opposition is exceedingly damaging to a school bond issue, and that the support of community influentials is very important to a bond election's success.

7. February and October appear to be particularly good months to conduct school bond elections, while January, September, and November are also suitable. School bond elections should not be held during the summer or near tax deadlines.

8. The optimum length of bond election campaign is widely debated, with no clear pattern of research findings emerging.

9. Some students of bond elections are convinced that the voters should be given cogent reasons for supporting school bonds, while others are equally convinced the voters would be

confused if given the facts.

10. Most researchers have tended to feel that certain communities are particularly predisposed to support school bonds, but this view is not universally held.

11. There seems to be general agreement that the amount of the bond issue has little effect on the outcome of an election, although the question of a tax increase may have a significant effect.

A comparison of these conclusions with the hypotheses listed early in this paper reveals the extent to which findings about school bond elections are inapplicable to the community junior college content. None of the original hypotheses has been directly contradicted and invalidated by this literature survey, but none of the authors surveyed even mentioned some of the variables found to be particularly important in the author's study of bond elections for new junior colleges. For instance, the question of the going concern was not considered; nor was the site selection-building plans-educational specifications issue raised to any great extent.

Thus, it becomes apparent that further study of junior college bond elections is needed. The junior college movement is faced with massive growth in the coming years, and facilities must be built to accommodate this influx of new students. In view of the fact that bond issues will of necessity be the source of funds for much of this capital outlay, a national study of bond elections for new junior colleges would be particularly appropriate at this juncture.

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