



# DELRAN SCHOOL DISTRICT

## BOE Work Session Bond Referendum 101 Presentation September 9, 2019



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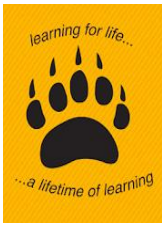
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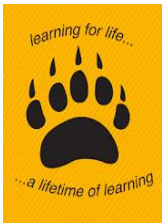
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# DELTRAN SCHOOL DISTRICT

## AGENDA

- 1. NJDOE School Facilities Funding Options**
- 2. BOE Decisions Impact Success**
- 3. School District Programming 101**
- 4. School District Financing 101**
- 5. Bond Referendum Schedule**
- 6. Senior Citizen Tax Freeze Program**

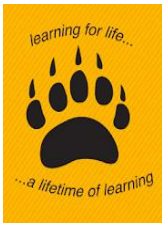


# DELRAN SCHOOL DISTRICT

## New Jersey Educational Facilities Construction and Financing Act

The New Jersey Educational Facilities Construction and Financing Act (P.L.2000,c72), enacted on July 18, 2000, launched the New Jersey School Construction Initiative (NJSCI) – a **multi-faceted, comprehensive program for the design, renovation, repair, and new construction of primary and secondary schools throughout New Jersey.** The initiative is the largest school construction program undertaken by the State of New Jersey and represents one of the largest school construction programs ever undertaken in the nation.

- **2000 - \$8.6 billion** was bonded State debt issued by the NJ Economic Development Authority now called the **New Jersey School Development Authority.**
- **2008 - \$3.9 billion** was allocated for additional funding for the NJSDA.
- The School Construction Initiative provides for **100% State funding of** approved projects in the 31 “special needs” Abbott districts.
- For approved projects in **all other districts** throughout New Jersey the State will fund at least **40%** of the eligible costs or **the district DAP – which means funding of 47.95%** for your District.
- The only way the State will help fund school projects today is via **Debt Service Aid.** Districts must incur debt or borrow money in order to get money from the State. Projects funded through the annual school budget are not eligible for State Aid. ROD Grants Round 4 expired in September of 2013.
- The State will **not allow** school districts to **carry over significant money** to replace building systems from year to year and has capped the school budget increases so districts cannot easily replace building systems within their annual budgets.
- **New construction is penalized** by a low State mandated (Educational Facilities Construction and Financing Act) construction dollar value of \$143 per square foot. Actual current new construction cost varies significantly from region to region but is between \$300/SF to \$350/SF. In Addition, the State only pays a maximum of 40% of “eligible costs” based on \$143/SF new construction value.
- **Renovation costs are not penalized** and can reflect the current market values. The State pays 40% of “eligible costs” based on the architect’s construction estimate for all renovations.
- In conclusion, **in order to get State money, districts must incur debt because the “one-time legislation” ROD Grants expired in September of 2013. The State,** because of the funding formula, **provides more money to districts that renovate existing facilities** vs. new construction.



# DELTRAN SCHOOL DISTRICT

## BOE Decisions Impact Success

### Building a Better Bond Referendum

Before you can start construction, you have to pass a referendum. What factors favor the board?

By Michael Yaple

**Two identical districts, two referendums ...which one will voters approve?**

	DISTRICT 1	DISTRICT 2
Type of District	K-12	K-12
Date of Election	April (Annual School Election)	December
Amount Requested	\$4,988,320	\$15,000,000
Projects Requested	<ul style="list-style-type: none"> <li>• Boiler at the high school</li> <li>• Roof repairs to both elementary schools</li> <li>• Renovations to the middle school</li> </ul>	<ul style="list-style-type: none"> <li>• Security and safety upgrades at the high school (cameras, fire suppression system)</li> <li>• Artificial turf and lighting for football stadium</li> <li>• Upgrade science labs at the high school</li> <li>• New administration building</li> <li>• New parking lots at the middle and the high school</li> <li>• Install sidewalks at the high school</li> <li>• Air conditioning in the middle school gym</li> <li>• Technology upgrades to the high school</li> <li>• Solar panels at the middle and the high school</li> </ul>

**December is the most popular** date, but also the least successful at 62%.

**Sept is the most successful** at 74%...?

Others all equal at 69% Passed.

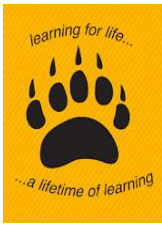
**Small dollar amounts** seem to play a role in voter approvals. What is the Annual Tax Impact?  
 <\$10M-71%...\$10-30M-68%...>\$30M-62%

Voters respond more positively to additions (61%), renovations and repairs (67%), especially roofs and boilers (92%) than to athletic facilities (27%) and new schools (52%).

Parity: District 2's referendum largely focuses on its high school **while disregarding its elementary schools**, while District 1 addresses issues in all schools.

Many of District 1's projects were more removed from the classroom (sidewalks, Admin. Building)

**Multiple Questions?** Q1-68%...Q2-38%  
 1/3rd each PP, PF, FF



# DELTRAN SCHOOL DISTRICT

## BOE Decisions Impact Success

Since 1997, NJSBA has tracked every school construction referendum in the state – what was requested, when it was held, the cost, and whether it passed. No other state agency or organization provides this service. After analyzing all 506 bond referendums held since 2002 – the first full year that school elections were limited by state law to five specific dates a year – NJSBA found some common threads among successful bond referendums.

**Timing is Everything** What's the best time of the year to hold a referendum? Is it December, when people are in a “giving” mood during the winter holidays? Bah, humbug! December is one of the most common months to schedule a school bond referendum, but it is by far the least successful...with a paltry 62 percent pass rate.

**The best time** is when school starts. Since 2000, the September referendum date has provided the greatest edge, with a 74 percent success rate. The success rates for the three remaining referendum dates during the year – January and March – hold fairly constant, each at about 69 percent. November is the least successful date.

**New vs. Fixer-upper?** Most homeowners would say it's more cost effective to fix and expand their existing house rather than buy a brand new home. Similarly, voters respond more positively to school renovations and additions than to new school facilities.

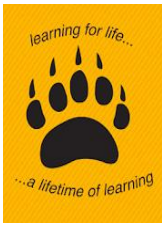
**Voters approved 67 percent of questions asking for renovations**, and 61 percent of questions asking for additions. But when the question included a request for a new school, the success rate dropped to 52 percent. (Note that ballot questions will often include multiple requests: Funding for a new school and additions/renovations to existing schools.)

**Review the Wish List** Exactly what a school board requests can play a huge role in how well voters respond. Voters demand that children in their hometown attend warm, dry schools. But the more removed the spending request is from the traditional classroom, the less likely voters are to approve it.

**Athletic facilities are the least successful item.** These include track and field renovations, artificial turf, gyms, swimming pools, playgrounds and field lighting. Voters only approved 43 percent of questions that included sports facilities. That includes referendum questions that asked for approval for athletic facilities along with academic facilities, such as asking voters to approve a weight room as well as science labs.

But since 2006, voters **have approved 92 percent of questions (11 of 12) asking for heating upgrades or boiler repairs**. Just don't ask for air conditioning only; the few questions that requested AC in the past three years were rejected.

Voters also **respond when it comes to fixing leaky roofs**. Since 2002, 77 percent of voters gave the thumbs-up to questions that included roof repairs.



# DELRAN SCHOOL DISTRICT

## BOE Decisions Impact Success

**Security upgrades** – such as cameras, alarms and fire suppression systems – generated a 65 percent success rate.

The \$64,000 Question Yes, the dollar amount requested plays a role in referendums. Call it the Wal-Mart effect, but people are drawn to things that appear to cost less – perceiving a product at \$9.99 as more affordable than one costing \$10.00.

**Separation Anxiety** Should the board offer two separate questions? Some school boards propose a larger, primary question, coupled with one or more separate, smaller questions (often with their approval contingent upon the success of the primary proposal).

**Odds are voters will reject the separate questions.** Those additional questions have a 38 percent success rate – a fraction of the 68 percent success rate for the primary bond referendum questions. Perhaps voters view the main request for what's needed, while the smaller requests are simply for amenities.

**Referendum Wildcards** NJSBA has studied factors that can be measured, but there are other immeasurable ingredients that impact a referendum vote.

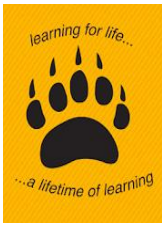
For instance, **vocal and organized opposition can undermine a school board's best efforts** to pass a referendum. While the public's concerns are valid and need to be addressed, school officials often find greater success when they focus their energies on mobilizing the 'yes' vote, rather than trying to change the minds of the hardened opposition.

**Rumors can spread wildly**, so boards need to act quickly to stamp out hearsay. In one local district, for instance, a number of voters reported to NJSBA staff that they had rejected the district's referendum because they heard each student would receive a laptop computer to take home and keep – something not even remotely on the ballot.

However, some ballots have such vague wording that it's difficult to determine what is being requested. **A school board might want to review the ballot language to make sure it accurately describes the proposal without locking the district into an unwanted restriction** (for instance, don't promise a school for grades 3 to 6 if there is a chance that it might end up being used for high school students).

**A split board can signal to voters that there are divisive issues with the school-construction proposal.** Most consultants recommend that the board present a unified front in its support of any construction plan. And boards should present accurate information to citizens, and deal openly and honestly with their questions.

The board has control over many aspects of the bond proposal. But when it comes to the less tangible wildcard factors, boards should always be cognizant of the cardinal rule of referendums: **Never give citizens a reason to vote 'no.'**



# DELTRAN SCHOOL DISTRICT

## School District Programming 101

### **Facility Evaluation - Programming**

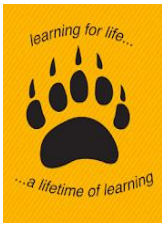
- Conduct a comprehensive inventory of the facilities, document the expected and extendable life of systems and materials
- Preparation of a Building Program to meet the defined Facility needs
- Review Building Program with the Board
- Finalize Building Program based on the Board's decisions
- Preparation of conceptual schematics and accurately dimensioned floor plans of all interior spaces
- Review of all options with the Board
- Preparation of conceptual plans based on the chosen scope of work
- Review of conceptual plans with the Board
- Presentation to the public and other interested constituencies to gain support

### **NJ DOE Document Preparation**

- Prepare a NJ DOE Project Application(s), Schematic Drawings and Cost Estimates
- Negotiate Eligible Costs with the NJ DOE for Debt Service Aid
- Assist the BOE in accepting the PEC – Establish Final Eligible Costs

### **Long Range Facilities Plan**

- Modify and update the LRFP in accordance with the Approved Referendum Program



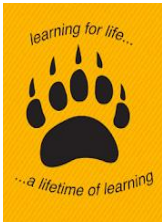
# DELTRAN SCHOOL DISTRICT

## School District Financing 101

### Prior to Referendum Day

- ❑ **Determine Total Project Cost and the State Percentage of Project Cost**
- ❑ **Assemble financing professional team**
  - **Bond Counsel**
    - ✓ Prepare Referendum Question and other documents/resolutions in connection with special election
    - ✓ Assist with Obtaining State approvals for Extension of Credit and Maturity Structure (DOE and LFB)
    - ✓ Attend Public Forums on Referendum
  - **Financial Advisor**
    - ✓ Prepare preliminary tax impact analyses and investment strategy analyses
    - ✓ Calculate Extension of Credit and other related items for necessary State approvals
    - ✓ Assist with Obtaining State approvals for Extension of Credit and Maturity Structure (DOE and LFB)
    - ✓ Attend Public Forums on Referendum
  - **Auditor**
    - ✓ Prepare Supplemental Debt Statement





## 1. Traditional Methods

Newsletters  
Q & A Sheets  
Fliers

News Releases  
Letters to the Editor

Lawn Signs  
Display Advertisements

Back-to-School  
Presentations  
Table-Top Displays

Facility Tours  
Koffe Klatches/Cocktails

**SCHOOL FACILITIES REFERENDUM**  
What services does the Student Resource Center offer?  
• Underclass / Pre-Major Advising  
• Academic Success / Study Skills Workshops  
• Career Services  
• Disability Services  
• Education Abroad  
• Supplemental Instruction and Tutoring

**Referendum Newsletter**  
from the Edison Township School District  
September 2009  
Edison Township Board of Education • 1024 Almond Road • Edison, NJ • 201-261-8204  
A Letter from the Board President  
At the July meeting of the Board of Education, we accepted the following resolutions:  
• To provide for normal life-cycle replacement of qualified faculty members or educators.  
• To improve environmental systems and controls at the Old School to modernize it.

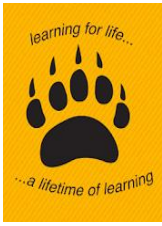
**Woodstown mayor supports proposed Woodstown-Pikergrove School District referendum**  
WOODSTOWN Mayor Thomas H. ...  
WOODSTOWN Mayor Thomas H. ...  
WOODSTOWN Mayor Thomas H. ...

**Support Edison's Children**  
**Vote Yes Tuesday, April 15**  
**School Bond Referendum**  
**Vote Yes**  
Yes vote builds new elementary school near new housing development.  
Yes vote keeps special needs children home in Edison. Saved tuition = offset tax increase.  
Yes vote gives children 21st century classrooms with new computers, technology, distance learning & "Smart Boards"

**Annual School Budget**  
**Vote Yes**  
Protect Edison's outstanding educational program. Give our children a future.  
• 97% graduation rate  
• 98% of seniors went to college  
• 45% of teaching staff with advanced degrees (PhD, M.A.)  
• Excellent athletic programs  
Regional and state champions — Baseball, Softball  
Coach of the Year honors  
• More than 700 students achieved passing scores on Advanced Placement Exams  
Edison's children make us proud. On April 15th, make our children proud of us. **Vote Yes!**

**SCHOOL REFERENDUM**  
**YES**  
Tuesday December 14  
3 PM to 9 PM





# DELRAN SCHOOL DISTRICT

## 2. Non-Traditional Means

### Social Networking 2.0

- Web pages
- Facebook & Twitter
- Graphic Email / Listserv
- On-line Surveys
- Telephone Messaging
- Blogs & Community Forums
- Recruitment Pages
- Videos & Slide Presentations
- Local Cable Network



**Property Tax Impact Calculator**  
**Kingsway Regional School District**  
**for Woolwich Taxpayers**

September 27, 2011 Referendum

Assessed Value: \$  Calculate

Avg Annual Tax Impact: \$

To use this Tax Impact Calculator, enter the Assessed Value of your Land & Improvements (top box) as shown on your Tax Bill from the municipal Tax Office.

Enter the Assessed Value as a whole number without commas, dollar sign or decimal places. e.g. enter 220000, not \$220,000. Then, click on the 'Calculate' button.

The estimated average, annual Tax Impact of this referendum on your property will show in the bottom box.





# DELRAN SCHOOL DISTRICT

## 3. Enhanced Outreach



**Voting Parents**  
**Voters by Neighborhood**

Name	SI No & Name	ZIP	CITY	STATE	PAGE	CAE	Age	Sex	Age	HW/CAE	Phone Number	Neighborhood
AMANDA BOYLE	101 BAYVIEW AVE	08240	STRATHMERE	NJ	Gen X'er		M	13	53	Str Low-Gov Med		Strathmere North
KORIN JAMICHSKI	104 BAYVIEW AVE	08240	STRATHMERE	NJ	Millennials		M	27	53	Str No-Gov Low		Strathmere North
DANIEL WEISBERG	210 BAYVIEW AVE	08240	STRATHMERE	NJ	Millennials		M	27	53	Str No-Gov Low		Strathmere North
MATTHEW SPERRY	270 BAYVIEW AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str Low-Gov Low		Strathmere North
DENNIS WELLS	8 COMMONWEALTH AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
JAMES MC DONALD	210 COMMONWEALTH AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
MANION HIGDON	18 BEACLIFF AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
DANIE HIGDON	18 BEACLIFF AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
GARY HIGDON	18 BEACLIFF AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
JEFF HIGDON	18 BEACLIFF AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
DOROTHY CLIFFORD	13 E BEACHTER AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
JOHN LUGG	16 E WHITTIER AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
MICHAEL MC MALLY	16 E WHITTIER AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
ROBERT WAGNER	16 E WHITTIER AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
WENDY DOUGHERTY	16 E WHITTIER AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
JOHN DOUGHERTY	16 E WHITTIER AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
THEODORE KINGSTON	22 E WINDROP AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
ELLEN WHEAT	13 E WINDROP AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
TOM MILLER	13 E WINDROP AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
MICHAEL HILSON	13 E WINDROP AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
HILLEN WILLIAMS	21 E WINDROP AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
LISA WANNING	21 E WINDROP AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
GREG BENNETT	26 E WINDROP AVE	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
DENISE ROBINSON	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
MARY POWELL	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
LARSEN WOODLAND	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
BRUCE HIGDON	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
JOHN FLEMING	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
JOHN MC DONALD	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
SUSAN HANSEN	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
ANDREW FINNEN	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
ALFRED VOTON	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
DEBORAH VANDERPUT	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
CHARLES BUSKEL	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
SCOTT DANIEL	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
CURTIS SCHWELZER	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
JOHN SCHWELZER	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
JESSICA KRUEGER	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
PAUL KRUEGER	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
LUCAS KRUEGER	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
GAILLEN FORD	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
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WILLIAM CORNAN	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
MARK EUNDELWELT	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
JACQUELINE CUNNINGHAM	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
LYNDA BROWN	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
KENNETH BROWN	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
GLORIA CAMPBELL	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
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DAVID HENRI	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
STEPHANIE BLACK	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
PATRICK NORRISBY	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
PHILIP WHITLOCK	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North
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MAUREEN HOFFMAN	31 N BAYVIEW DR	08240	STRATHMERE	NJ	Boomer		M	58	53	Str No-Gov Low		Strathmere North

**Voting History**  
**Frequency**  
**Age Group**  
**Greatest Generation**  
**Baby Boomers**  
**Gen X'ers**  
**Millennials**  
**Address**  
**Telephone**  
**Affiliation**  
**Name**

**PRIORITY**

“I advise you to apply to all those whom you know will give something; next, to those whom you are uncertain whether they will give anything or not, and show them the list of those who have given; and, lastly, do not neglect those who you are sure will give nothing, for in some of them you may be mistaken.”  
 -Ben Franklin



# DELRAN SCHOOL DISTRICT

## Bond Referendum or Ballot Question Proposed Schedule

Event	Responsible Party				Minimal Critical Timing	Bond Referendum Date	Ballot Question Date	Bond Referendum Date
	Architect	School District	Bond Counsel	Other				
Building Program/Scope Schematic Design Update LRFP	• • •	• • •				August 2019 – March 2020	August 2019 – May 2020	August 2019 – June 2020
Architect submits to NJ DOE	•				N/A	April 2020	June 2020	July 2020
LRFP Revise and Resubmit	•				N/A	April 2020	June 2020	July 2020
NJDOE Issues PEC Offer	•	•	•		N/A	May 2020	July 2020	August 2020
NJDOE issues FEC					N/A	June 2020	August 2020	September 2020
Board Approves Special Election		•			60 Days	July 31, 2020	September 4, 2020	October 9, 2020
Filing of Supplemental Debt Statement				Auditor	60 Days	July 31, 2020	September 4, 2020	October 9, 2020
Co-Muni Clerk, Board of Elections Notice		•			60 Days	July 31, 2020	September 4, 2020	October 9, 2020
Planning Board Submission/Meeting	•	•			55 days	August 5, 2020	September 9, 2020	October 14, 2020
Publication of Vote by Mail Notices			•	Clerk	50 days	August 10, 2020	September 14, 2020	October 19, 2020
Certified Proposal (Questions) Statement to County Clerk		•	•		21 Days	September 8, 2020	October 13, 2020	November 17, 2020
Publication and Posting of Notice of Special Election			•	Board of Elections	10 Days	September 19, 2020	October 24, 2020	November 28, 2020
Furnishing of Sample Ballots			•	Clerk	8 Days	September 21, 2020	October 26, 2020	November 30, 2020
Obtain Certification of Grade Level Instruction			•		1 Day	September 28, 2020	November 2, 2020	December 7, 2020
<b>Special Election</b>				Board of Elections		<b>September 29, 2020</b>	<b>November 3, 2020</b>	<b>December 8, 2020</b>



## Senior Freeze (Property Tax Reimbursement)

Benefits under the new Homestead Property Tax Credit/Rebate Program are in addition to the State's other property tax relief programs. The Senior Freeze (Property Tax Reimbursement), the property tax deductions for senior citizens and veterans, and the property tax deduction/credit on the State income tax return.

### Property Tax Reimbursement Eligibility Requirements

You may be eligible for a reimbursement of the difference between the amount of property taxes you paid for the base year (the year you first became eligible) and the amount paid for the year for which you are applying for a reimbursement if you met all the following requirements for the base year and for each succeeding year, up to and including the year for which you are claiming the reimbursement:

1. You are **age 65** or older or receiving Federal Social Security disability benefits; and
2. You have **lived in New Jersey continuously for at least the last 10 years**, as either a homeowner or a renter; and
3. You have **owned and lived in the home for at least the last 3 years**; and
4. You have paid the full amount of property taxes that were due on your home for the base year and for each succeeding year, up to and including the year for which you are claiming the reimbursement;
5. You meet the income limits for the base year and for each succeeding year, up to and including the year for which you are claiming the reimbursement.

**2016 Income Limits:** ALL INCOME received during the year — with very few exceptions — must be taken into account when determining eligibility. This includes income that you do not have to report on your New Jersey income tax return such as Social Security benefits, disability benefits, and tax-exempt interest. Applicants are eligible only if their total income was \$70,000 or less (the original limit was \$87,007), and they meet all the other program requirements. Eligible applicants whose income was over \$70,000 but was \$87,007 or less did not receive a reimbursement but established eligibility for future years with their applications.

•Call the Property Tax Reimbursement Hotline at 1-888-238-1233