



How to Talk to Your Community about School Finances and Taxes

*WASBO Fall Conference
October 5, 2023*

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Mequon-Thiensville School District

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Donovan Group



ASSOCIATION OF
SCHOOL BUSINESS OFFICIALS
INTERNATIONAL

Budget Communication and Community Relations

April 2023 webinar

OVERVIEW

- **Define how to effectively communicate budget related topics.**
- **Be able to identify strategies to build effective community partnerships.**
- **Recognize opportunities to share the budget information and strategic partnerships.**

INTRODUCTIONS



Brian Nicol



Sarah Viera





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Why are we communicating?

This is difficult and
challenging stuff to
understand

People are affected by this

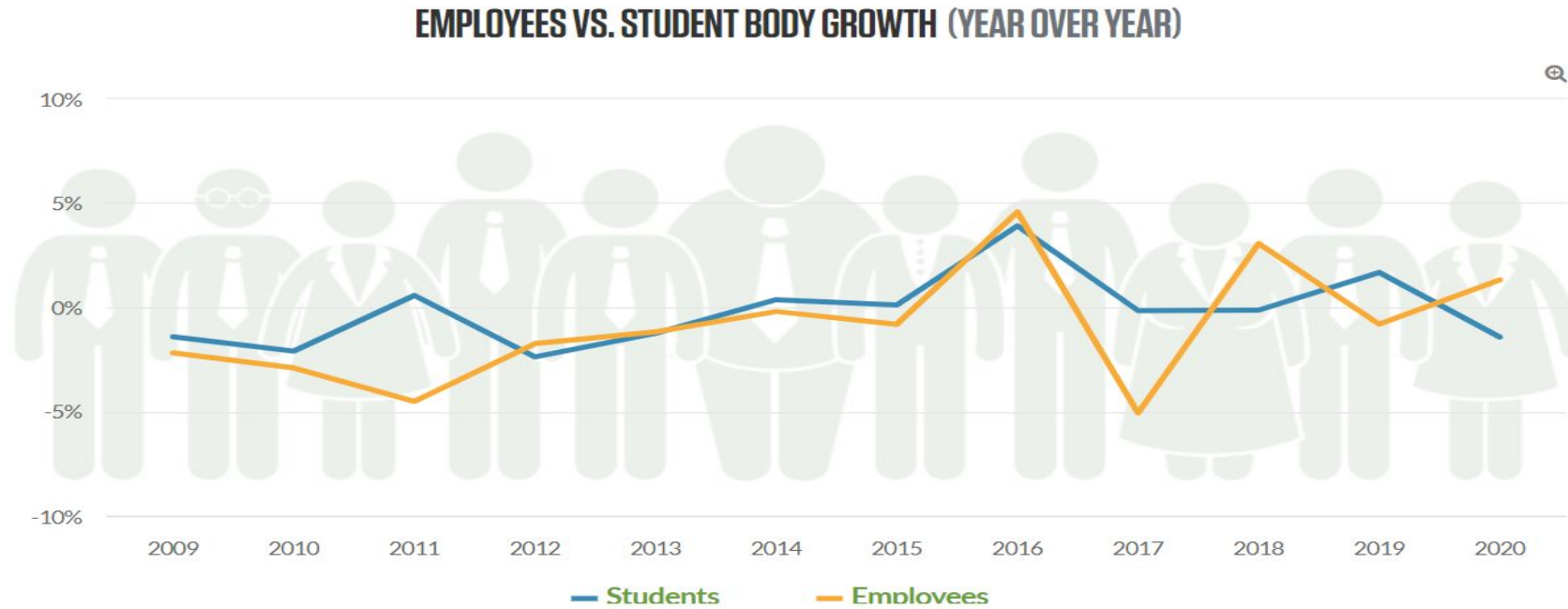
People want to know or may
not want to know, but they
should know

If you do not communicate
it, people will write their own
narratives



Most people trust their emotions over fact!

Use data to drive decisions

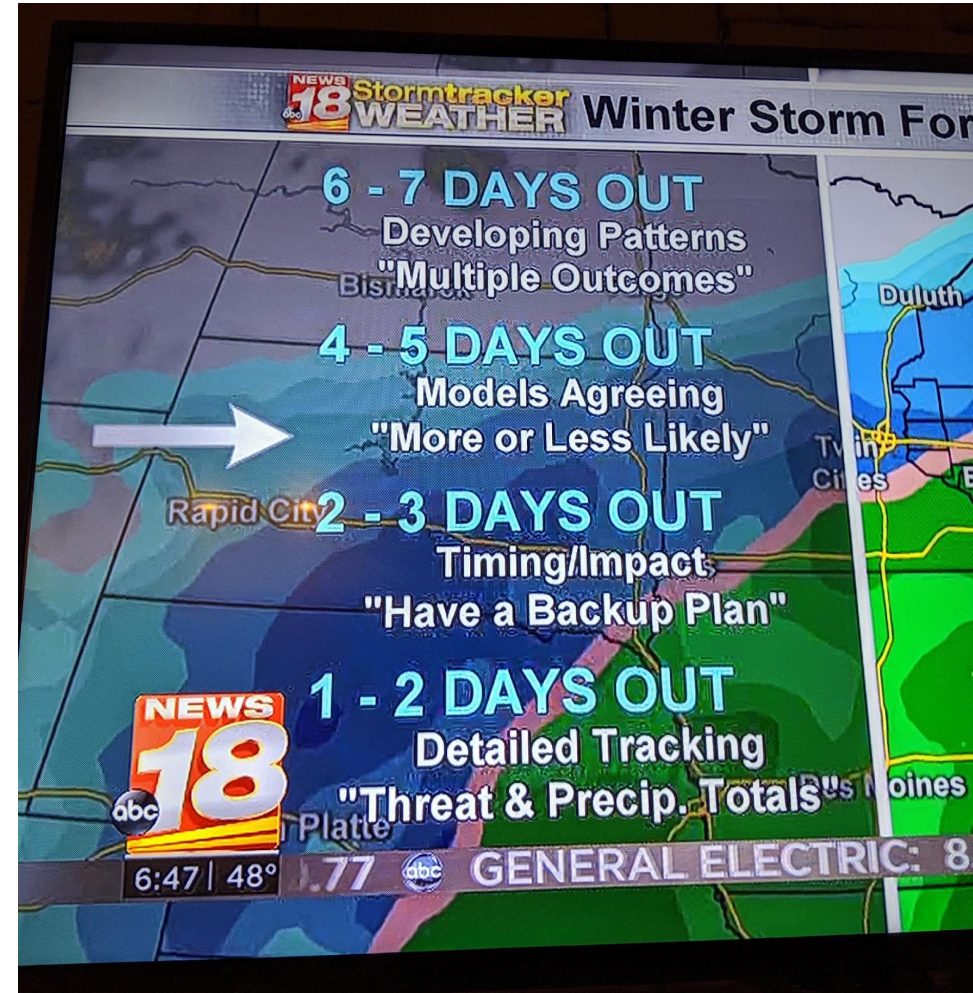


- Use comparator data
- Include historical and projected information
- Data and narratives can often tell two different stories

How are we communicating?

Be transparent

- Be proactive
- Prepare multiple scenarios
- Look forward
- Consider the long-term impact of your decision



How are we communicating?

Look through their lens



Be Proactive

Understand
what the district
needs (wants?)

Identify
external
variables

Create
scenarios
linking state
variables to
district-specific
impacts

Communicate



Can include teachable moments

Anticipate Potential Changes

Focus on three key messages:

- What do they know?
- What do they care about?
- What do you want them to think or do?

Or...

- What is the “issue”?
- Why is it important?
- How does it impact them?



Your stakeholder group determines how these questions are answered and how the messages are shaped.



- Audience
- Medium
- Message

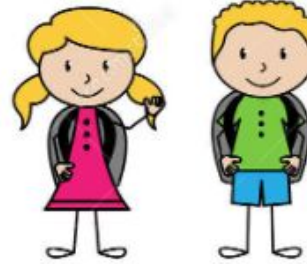


Telling the Story

**Equalized
Property
Value**



**Membership
(student FTE)**



**Spending
(shared costs)**

Fiscal Responsibility & Accountability

We strive to build trust and add value among all members of our community through effective management of resources while creating and maintaining the best environment for growth. The Mequon-Thiensville School District has been affirmed at the highest rating possible, Aaa, by the bond rating agency Moody's, making the district one of only three in the state to hold the top rating. Our [Transparency Center](#) provides a report of our finances, student demographics, staffing trends, test scores and more.

The graphic features the Mequon-Thiensville School District logo at the top, with the tagline "The Launchpad to Success". Below the logo, the text reads "Annual Meeting & Budget Hearing" in large, bold letters. Underneath, it specifies the date and location: "Monday, July 25, 2022 | 7 p.m. Range Line Community Center 11040 N. Range Line Rd., Mequon". At the bottom, it says "More information available soon".

Annual Meeting & Budget Hearing

Members of the community are invited to attend the Mequon-Thiensville School District's budget hearing and annual meeting. The annual meeting will be held immediately following the budget hearing. The meeting will take place in the Board Room at the Range Line Community Center.

MONDAY, JULY 25, 2022 AT 7 P.M.
RANGE LINE COMMUNITY CENTER
11040 N. RANGE LINE RD.
MEQUON, WI 53092

Why should you attend?

- Participate in the discussion of the 2022-23 budget
- Vote on the 2022-23 school district levy
Must be a U.S. citizen and school district resident for at least 28 consecutive days prior to the annual meeting. Must also be 18 years of age or older as of July 25, 2022.

Notice on Meeting Access: The Budget Hearing and Annual Meeting will take place in person with a view-only livestream available via Zoom. Community members wishing to participate in discussion and vote on the 2022-2023 school district levy must attend in person.

Budget Resources

BUDGET DEVELOPMENT PROCESS & FAQS

AUDITED FINANCIAL REPORTS

MTSD TRANSPARENCY CENTER

Proposed Budget

2022-23 PROPOSED BUDGET BOOK

Budget Hearing Presentation

2022-23 Budget Hearing

2022-23 Budget Hearing

2021-22 Budget Hearing

2021-22 Budget Hearing

2020-21 Budget Hearing

FINANCE

Who We Are

The Finance Department is part of the Operations Department and is focused on exercising responsible financial stewardship for HSSD.

2022-23 Budget Book

During the Annual Meeting and Budget Hearing each year, Superintendent Damian LaCroix presents the budget to the Howard and Suamico residents in attendance. Following the meeting, a Budget Book is created for reference. [View the 2022-23 Budget Book here.](#)

+ Audit Results

+ Property Tax Information

+ Referendum Videos: April 2021

<https://www.mtsd.k12.wi.us/district/budget>

<https://www.hssdschools.org/departments/operations/finance>



****A SECOND NOTICE will be sent if you pay in installments.**

For online payments visit: www.co.brown.wi.us/treasurer or Toll Free at 1-877-765-4110

Point & Pay charges a fee of 2.39% for credit cards. E-check payments are charged \$.50 per transaction.

Payments in person or mailed to: Brown County Treasurer, PO Box 23600, 305 E Walnut, Green Bay WI 54305-3600

or in person at: **Associated Bank (Existing Associated Bank customers only)**

Community First Credit Union **North Shore Bank**

See www.co.brown.wi.us/treasurer for addresses and a map of all bank locations collecting property taxes.

FOR INFORMATIONAL PURPOSES ONLY - Voter-Approved Temporary Tax Increases

Taxing Jurisdiction HOWARD-SUAMICO SCH	Total Additional Taxes 17,292,092	Total Additional Taxes Applied to Property 2,558.30	Year Increase Ends 2023
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HOMEOWNERS CHECK FOR LOTTERY & GAMING CREDIT DEDUCTION ON PRIMARY RESIDENCE ONLY

PLEASE KEEP FOR YOUR RECORDS

PAUL ZELLER
BROWN COUNTY TREASURER
P O BOX 23600
GREEN BAY WI 54305-3600

STATEMENT OF REAL ESTATE TAXES FOR 2018

PARCEL# VH-727-E-37

OWNER

PROPERTY LOCATION

STATE OF WISCONSIN

CORRESPONDENCE SHOULD REFER TO THE ABOVE PARCEL #

K

Assessed Value Land	Assessed Value Improvements	TOTAL Assessed Value	Avg. Assmt. Ratio	Est. Fair Mkt. Land	Est. Fair Mkt. Improvements	Total Est. Fair Mkt.	
52,800	191,800	244,600	.9137	57,800	209,900	267,700	
TAXING JURISDICTION		2017 Est. State Aids Allocated Tax Disc.	2018 Est. State Aids Allocated Tax Disc.	2017 NET TAX	2018 NET TAX	% TAX CHANGE	NET PROPERTY TAX
STATE OF WISCONSIN		666,285	665,721	1,170.10	1,214.80	3.8+	4,227.30
BROWN COUNTY		1,362,623	1,489,697	960.00	959.90		
VILLAGE OF HOWARD		22,850,889	22,672,505	1,923.00	2,052.40	6.7+	
HOWARD-SUAMICO SCH							
NORTHEAST WI VTAE		1,761,695	1,810,467	211.80	220.70	4.2+	
TOTAL:		26,41,492	26,638,390	4,264.90	4,447.80	4.3+	Total Specials: .00
				First Dollar Credit	-62.50	2.9+	TOTAL DUE 4,227.30
				Lottery & Gaming Credit	-109.30	42.9+	
				NET PROPERTY TAX	4,093.10	3.3+	

J

SCHOOL TAXES REDUCED BY SCHOOL LEVY TAX CREDIT	407.80	NET ASSESSED VALUE RATE (Does NOT reflect Credits)	18.1839
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IMPORTANT: Be sure this description covers your property. Note that this description is for tax bill only and may not be a full legal description.

12,150 SQ FT
CRAIG MEADOWS 1ST ADDN
LOT 37

VH-727-E-37

Bill # 2109556

L

O

F

N

FULL PAYMENT PAY THIS AMOUNT

* 1st Installment MUST be Paid in Full by due date to avoid interest charges and loss of second payment option.

FIRST INSTALLMENT* 2,035.55
Pay 1st installment by Jan. 31, 2019

SECOND INSTALLMENT** 2,191.75
Pay 2nd installment by July 31, 2019





HOWARD-SUAMICO
SCHOOL DISTRICT

APRIL 6 REFERENDUM



\$100,000 of
Fair Market Value



5 Year Average - \$8.99 Levy Rate



ASSOCIATION OF SCHOOL BUSINESS OFFICIALS INTERNATIONAL

Howard-Suamico School District

Return on Investment Status Update

Investing in our Future		<p>\$4.6M 2018-2019</p> <p>\$5.85M 2019-2020</p> <p>\$5.85M 2020-2021</p> <p>\$5.85M 2021-2022</p>	<p>The 2018 operational referendum addressed three critical funding needs for HSSD:</p> <ol style="list-style-type: none"> 1. Hiring teachers to reduce class sizes 2. Improving HSSD's ability to compete in the teacher salary market 3. Addressing deferred maintenance needs
Reduce Class Sizes	<p>Elementary Schools </p> <p>Lineville </p> <p>Bay View </p> <p>Bay Port </p> <p>District Wide </p>		<p>Reduce Class Size</p> <p>A total of 35 additional positions were added to help reduce class sizes</p>
Facility Maintenance	<p>Bay Harbor LED lighting</p> <p>Forest Glen Flag pole</p> <p>Howard Library flooring</p> <p>Meadowbrook Blacktop repairs</p> <p>Suamico Flag pole</p> <p>Lineville Replace motor drives</p> <p>Bay View Auditorium upgrades</p> <p>Bay Port Fence repairs</p> <p>District Wide Annual concrete repairs Restroom toilet partitions Roof repairs Parking lot repairs</p> <p><i>Above projects were completed in 2021</i></p>	<p>\$1,918,292 2018-2019</p> <p>\$2,527,092 2019-2020</p> <p>\$2,782,831 2020-2021</p> <p>\$2,7658,272 2021-2022</p>	<p>Facility Maintenance</p> <p>Addressing additional maintenance needs throughout the district</p>
Supporting our Educators		<p>\$1,017,957 2018-2019</p> <p>\$1,034,839 2019-2020</p> <p>\$1,032,082 2020-2021</p> <p>\$1,098,154 2021-2022</p>	<p>Supporting our Educators</p> <p>Improving HSSD's ability to compete in the teacher salary market to help ensure we attract, recruit, and retain top talent</p>





Easton Courier

<https://eastoncourier.news> › 2023/02/17 › school-boar... ⋮

School Budget Process Is Underway—Here's How to Stay ...

Feb 17, 2023 — Superintendent McKinnon's proposed **budget** presentation to the ER9 **school** district explains the process of **budgeting**, strategic planning and ...



Shelton Herald

<https://www.sheltonherald.com> › news › article › shelt... ⋮

Shelton parents call for fully funded school budget

Mar 11, 2023 — This year's education **budget** proposal includes \$577,000 for hiring two elementary **school** teachers, three special education teachers and support ...



Cap Times

<https://captimes.com> › news › education › school-fundin... ⋮

School funding hangs in balance of Wisconsin budget debate

Feb 1, 2023 — **Tony Evers** is proposing an additional \$2 billion for the state's public schools.



Politico

<https://www.politico.com> › 2022/08/15 ⋮

School budget cut fight continues

Aug 15, 2022 — **The city** included \$215 million in cuts to school budgets in its preliminary budget in February.



Ohio Capital Journal

<https://ohiocapitaljournal.com> › 2023/03/20 › what-co... ⋮

What could the education budget look like for the next two ...

Mar 20, 2023 — The newest **budget** would include the Fair **School** Funding Plan, which has been phased in for two years, and another two years would be ...

Engaging the Community

Programs Overview

HSEF Educator
Grants

HSSD CARE Awards

Choose to Give - A
DonorsChoose.org
Partnership

Fundraise

What is the role of the Howard-Suamico Education Foundation?

We serve as a:

- Connector to community resources
- Collaborator with strategic partners
- Convener of courageous conversations
- Conduit by which the community can invest in education

Click below to see a few ways we achieve this!



Educator Grants

Innovative resources for students and educators in the Howard-Suamico School District



Choose to Give

A DonorsChoose.org partnership supporting teachers and classrooms in HSSD



Fundraise

Lead community events and capital campaigns and serve as a conduit for restricted gifts



**MEQUON - THIENSVILLE
EDUCATION FOUNDATION**



**SUPPORT
Mequon
Thiensville
SCHOOL DISTRICT**

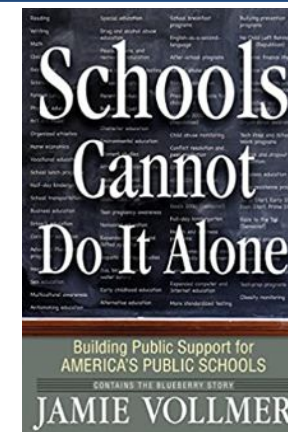
Engaging the Community



Leadership HSSD

All meetings take place from 7:30-9 a.m.

- September 30, 2022 (Kick Off Meeting)
 - District Overview, School & Community Relations
- October 21, 2022
 - District Governance and Legislation
- November 11, 2022
 - District/State Budget and Funding
- December 16, 2022
 - School/Classroom Leadership and Assessment Tools
- January 13, 2023
 - Digital Learning and Technology
- February 10, 2023
 - Student Services and Special Education
- March 3, 2023
 - District Operations, Facilities, and Safety
- April 14, 2023
 - Organizational Development and HR
- May 12, 2023
 - The HSSD Graduate Profile: A 21st Century Competitive Advantage



Howard backs donating unused funds to school district

🕒 SEPTEMBER 23, 2020 / 💬 0

Suamico to donate unused CARES Act funds to school district

🕒 OCTOBER 13, 2020 / 💬 0

Suamico, Howard discuss sharing grant writer with HSSD

🕒 JUNE 23, 2021 / 💬 0

Grant writer works for city, schools, chamber

By Robert Cloud

Since jointly hiring Greg Grohman as a full-time grant writer on Sept. 1, 2020, the city of Waupaca, the Waupaca School District and the Waupaca Area Chamber of Commerce have been awarded a total of \$1.43 million in grants.

Legislative Relationships



QUESTIONS?



Brian Nicol

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Sarah Viera

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2021-22 Budget Factors

- New State Biennial Budget
- Resident Enrollment
- Property Values
- What will next year look like for delivery of instruction?

Budget Development: Early Assumptions

- 1% increase in equalized value
- 2% increase in salaries
- 1.5% CPI (teachers & non-rep only)
- 2.5% average increase in benefits

How are we communicating?

Total Revenue Limit Authority



Budgeting Basics - Revenue Limit

