

Money Talks

WASBO WEBINAR

August 2024



Key Communications from the Business Office

- September: Third Friday Count
- October: Tax Levy
- November: Referenda



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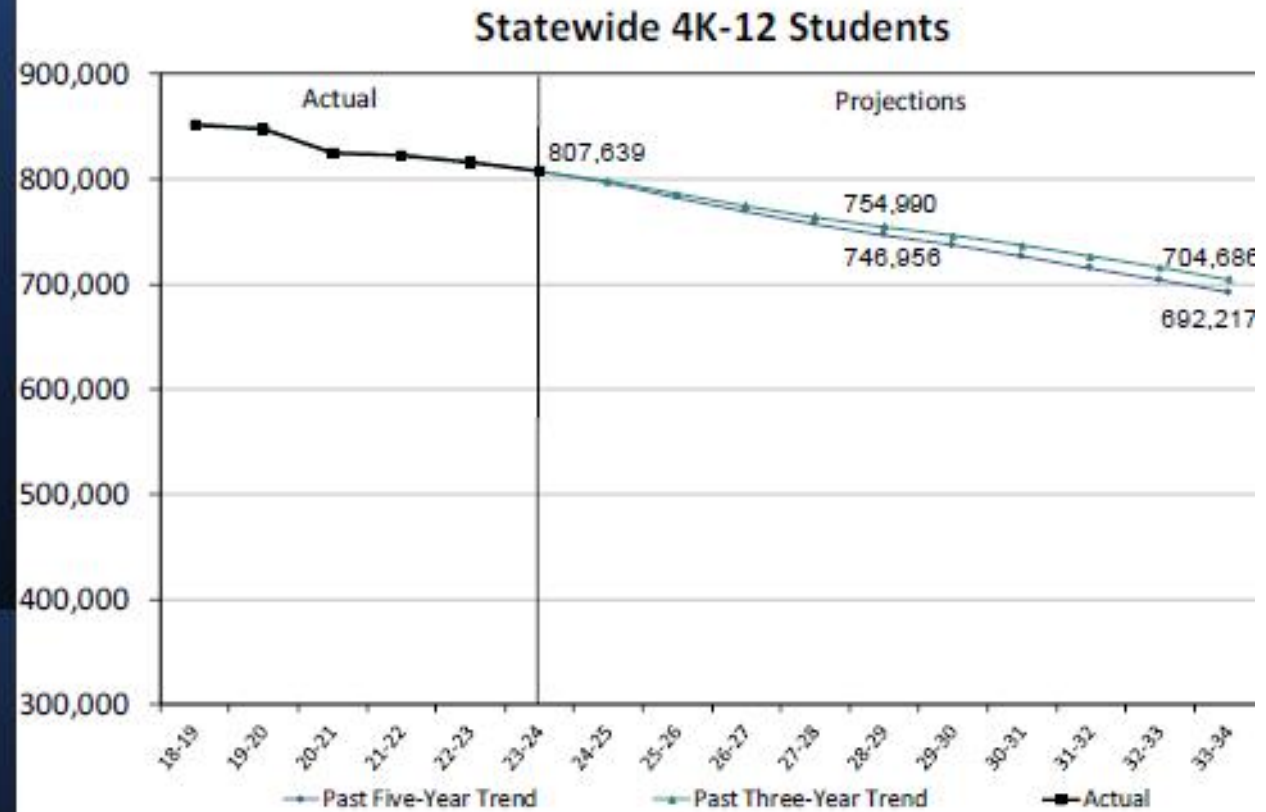


**Andy Weiland,
WASBO Board
Treasurer**

**All about Enrollment, or
Membership, or maybe
Head Count?**



Public School Projections 2024-2033



In 2028/29, 4K-12 enrollment projected to decrease an average of 7%.

All grade groupings to decline: K-5 by 8%, 6-8 by 4%, and 9-12 by 7.6%.



How to Talk About Enrollment

Count Date is: Friday, September 20

- Declining enrollment is the norm both in WI and nationally
 - Open Enrollment results are perceived as a market judgement on the quality of the school district (yet untrue)
 - Declining enrollment creates difficult budget problems. School District revenues are variable, but operating expenditures are usually not (school bus example)
 - Don't just report numbers, provide context
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How to Talk About the Annual Tax Levy

Due Date for Board to adopt Tax Levy: November 1

Election Day: November 5

Due Date to Certify to Munis: Nov 10

- It's okay to call out the levy impact of voucher/choice programs
 - It's okay to show the board the “gross” levy for their approval while also showing an estimated ‘net’ levy after applying School Levy Tax Credits for your school district (but the net levy is FYI only – the board votes on the gross levy)
 - What if you have a referendum on the November 5 ballot that could affect the tax levy? (Adopting two levy scenarios)
 - Be very careful with equalized tax rates – they can be misleading
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Two Twigs School District Equalized Mill Rate Example:

2023-24

Base Year Data:

Levy	<u>\$2,000,000</u>
Eq Tax Base	\$250,000,000
Eq Tax Rate (x 1000)	\$8.00 per \$1000 EPV

2024-25

10% increase in school district tax levy

10% increase in Eq Tax Base and *no new construction*

Levy	<u>\$2,200,000</u>
Eq Tax Base	\$275,000,000
Eq Tax Rate (x 1000)	\$8.00 per \$1000 EPV

“No Change in Tax Rate” *implies* no change in property tax bills, but actual tax bills will increase by 10% in this case.

How to Talk About Operating Referenda

Voters get a lot of misleading information

LEGISLATURE | JOINT FINANCE COMMITTEE

Budget committee approves \$1 billion K-12 education spending increase in Wisconsin

State aid to schools slated to increase

Most local districts expected to receive more state money than last year

EDUCATION

Evers veto to provide 400-year school funding increase

How to Talk About Operating Referenda

The process for an operational and capital referendum is largely the same:

A good referendum process answers three questions related to *need, process, and solution*.

A referendum ballot question is a ***solution*** that was created with a ***process*** to evaluate the ***need***.

How to Talk About Operating Referenda

Tactics

Create a message document

Create a roadmap - What will be done, when and by whom?

Dig deep into your communications toolbox -
recommend: three mail pieces

Board members are *communicators*

How to Talk About Operating Referenda

Four Types of Voters

Irrational Yes

Rational Yes

Rational No

Irrational No

Point your messaging toward **rational no** voters

How to Talk About Operating Referenda

Election Timelines

There is no right answer about when to place a question on the ballot

Give yourself time to do the process well

Turbulence hurts, chaos hurts

Financial bad news hurts

How to Talk About Operating Referenda

Final Thoughts

Do not get into advocacy. Stay far away from it!

Do make sure your board owns the referendum

Do not overreact to social media

Do tell the whole truth

Do not be afraid to address elephants in the room

Do use a lot of tools to get your point across

Do not be afraid to repeat yourself

THANK YOU
A GREAT START TO
THE NEW SCHOOL
YEAR!

