

400 YEARS?

Communicating About the State Budget: From Revenue Limits and State Aid to Property Taxes and Referendums

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Your Speakers



400 Years?



Our Time Together

- 1** Outline challenges of budget communications
- 2** Principles and Referendum
- 3** Q&A



Our Challenges


- "What is the district going to do with all of that money you are getting for the next 400 years? Will I see a tax reduction?"
- "Will staff salaries go up now that we have 400 years of new money?"
- "Will we see new facilities/athletic uniforms/playground equipment etc., now that the district has 400 years of new money?"



Our Challenges (continued)

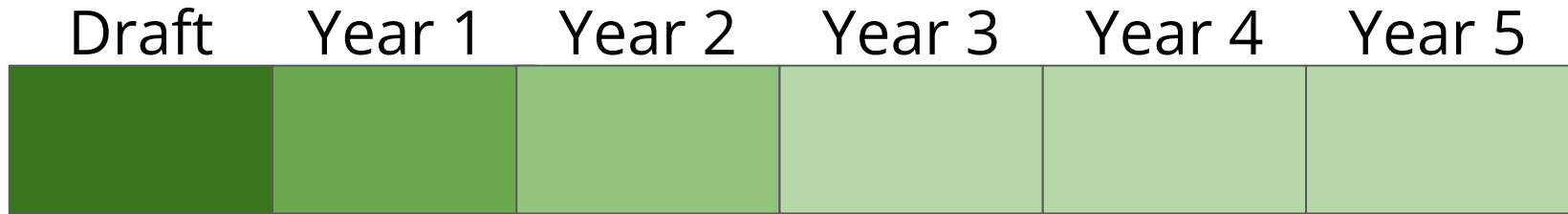
- "Wait... How is it possible that the district could possibly have financial challenges? I read the district has 400 years of new money."
- "Hold up... I can understand that the district has facility issues. But you have all of that new money. 400 years of it! Why can't that money be used to pay for our facilities?"
- "Why in the world is the district considering an operational referendum? You are flush with new money!"



A meme featuring a smiling man in a suit sitting in a chair, with the text "BUT WAIT, THERE'S MORE!" overlaid at the bottom. The man is looking towards the camera with a wide, happy expression. The background is a dark studio set with a cityscape visible through a window.

BUT WAIT, THERE'S MORE!

Strategic Planning vs. Biennial Budget



Themes

Inadequate
Inequitable



The background is a solid green color with a faint, semi-transparent network diagram. The diagram consists of several stylized human figures connected by thin lines, with speech bubbles of varying sizes scattered throughout, suggesting a communication network or social media structure.

What is the solution to these communications challenges?

Look Through Their Lens



400 Years?



The Bottom Line...

The more people know about the district's budget and the state budget, the better.

Our jobs are to (aggressively) tell the truth.

So, how do we create a communications approach to this?



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Financial Communications Principles

Financial Communications Principles

- Context matters
 - Moving too quickly into numbers can end listening abruptly
 - Context may not move polarized critics, but will move others
 - What works well in one community may be less effective in another



Financial Communications Principles

- We have a duty to communicate complex issues
 - If someone doesn't follow, it's not their job to catch up, it's our job to bring them along
- We must collaborate with our communications staff
 - Learn and lead together
 - Ask questions
 - Teach and coach



School Year	Class of 2023 Grade	Combined resource change (revenue limits + per pupil aid)	Amount behind inflation	National spending ranking (census)	Context Notes
2009-10	4K	\$200	\$75	17th	1st year revenue limit increases were decoupled from inflation
2010-11	5K	\$200	\$156	17th	Act 10
2011-12	1st	\$-554	\$998	21st	Revenue limits and state aid cut in 2011-13 budget
2013-14	3rd	\$100	\$1,395	21st	Statewide voucher program established
2015-16	5th	\$0	\$1,856	23rd	Sharp rise in referendum questions and dollars statewide
2019-20	9th	\$263	\$2,365	25th	COVID-19 Pandemic
2020-21	10th	\$179	\$2,520	25th	Inflation rapidly increases
2021-22	11th	\$0	\$2,863	N/A	Revenue limits are frozen, no increases for two years
2022-23	12th	\$0	\$3,235	N/A	Graduation! 2nd year of frozen revenue limits, inflation at record highs

Financial Communications Principles

- Consistency
 - Think differently about seasons of financial updates
 - Communicate financial information year round, not just during budget or referendum seasons
- Storytelling
 - Complex issues are more clearly understood through metaphors and stories
 - Defeasing debt vs. operational funding



Financial Communications Principles

- Vocabulary matters
 - Cost describes the amount of expenditures
 - Value is using words to describe the worth of something
 - Impact is the results gained from the cost of something
 - Invest vs. Spend
 - Resources vs. Revenue
 - Impact vs. Value vs. Cost



Create a Communications Foundation

Do this by creating communications tools you can use every year.

- *Have an explainer fact sheet on school finance*
- *Have an explainer fact sheet on the state budget*
- *Have an explainer fact sheet about revenue limits*
- *Create a fact sheet that provides details about tax bills*
- *Create FAQs about all the above*
- *Create explainer videos*



****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	Total Additional Taxes	Total Additional Taxes Applied to Property	Year Increase Ends
HOWARD-SUAMICO SCH	17,292.092	2,558.30	2023

HOMEOWNERS CHECK FOR LOTTERY & GAMING CREDIT DEDUCTIONS ON PRIMARY RESIDENCE ONLY

PLEASE KEEP FOR YOUR RECORDS

STATEMENT OF REAL ESTATE TAXES FOR 2018 PARCEL# VH-727-E-37

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

OWNER:
PROPERTY LOCATION:

STATE OF WISCONSIN

CORRESPONDENCE SHOULD REFER TO THE ABOVE PARCEL #

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 Ref. State Aid Allocated Tax Dis.	2018 Est. State Aid Allocated Tax Dis.	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		1,761,695	1,810,467	211.80	220.70	4.2+	
NORTHEAST WI VTAE							
TOTAL:		26,414,922	26,638,390	4,264.90	4,447.80	4.3+	Total Specials: .00
				First Dollar Credit -62.50	-64.30	2.9+	TOTAL DUE 4,227.30
				Lottery & Gaming Credit -109.30	-156.20	42.9+	
				NET PROPERTY TAX 4,093.10	227.30	3.3+	
SCHOOL TAXES REDUCED BY SCHOOL LEVY TAX CREDIT		407.80		NET ASSESSED VALUE RATE (Does NOT reflect Credits) 18.1839			
12,150 SQ FT CRAIG HEADOWS 1ST ADDN LOT 37				Bill # 2109556			
				VH-727-E-37			
				FIRST INSTALLMENT* 2,035.55			
				Pay 1st installment by Jan. 31, 2019			
				SECOND INSTALLMENT** 2,191.75			
				Pay 2nd installment by July 31, 2019			

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.

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.



Create a Communications Foundation

Continued...

- *Put all of these items on your website*
- *Print out these items and make them available to attendees at board meetings.*
- *Use social media, but do so strategically*

For all of these, be factual. Do not provide opinions.



Create a Communications Foundation

Make sure all board members and members of the admin team are conversant about the budget and aware of how and where to direct folks to the above resources.

- Website tours for leaders
- Create internal talking points documents
- Create internal FAQs
- Have template slide decks ready to go



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**For those pursuing a
referendum...**

Referendum Communication

- 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**.

Referendum Communication

Define the *need*

- This is the most important set of messages
- Community members will want to address needs
- A majority will not desire to address wants
- Explain the *why*
- A need in one district is a want for another
- Simplify!

Referendum Communication

What *process* is used to evaluate the needs?

- What is the board doing to consider the needs and to engage the district community to find a solution?
- The more engagement you have, the better. Do not be afraid to let people in.
- This work can include engagement sessions, a task force, and a survey.

Referendum Communication

What solution will come from the evaluation process that addresses the needs?

- This is what will be on the ballot

Referendum Communication

Tactics

- Create a message document
- Create a roadmap
 - What will be done, when and by whom?
- Dig deep into your communications tool box
 - We recommend: three mail pieces
- Board members are *communicators*

Referendum Communication

Four Types of Voters

- Irrational Yes
- Rational Yes
- Rational No
- Irrational No

Point your messaging toward **rational no** voters

Referendum Communication

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

Referendum Communication

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

The background is a solid green color with a faint, semi-transparent network diagram. The diagram consists of several stylized human figures (represented as small circles with a vertical line for a neck) connected by thin lines. Some of these figures have speech bubbles next to them, indicating communication. The overall theme is a network or communication system.

**Important: Keep the
communications going!
Do not stop!**

Investing in our Future



\$4.6M
2018-2019

\$5.85M
2019-2020

\$5.85M
2020-2021

\$5.85M
2021-2022

The 2018 operational referendum addressed three critical funding needs for HSSD:

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

Elementary Schools



Lineville



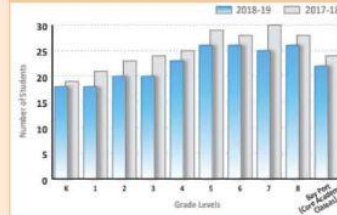
Bay View



Bay Port



District Wide



Reduce Class Size

A total of 35 additional positions were added to help reduce class sizes

Supporting our Educators



\$1,017,957

2018-2019

\$1,034,839

2019-2020

\$1,032,082

2020-2021

\$1,098,154

2021-2022

Supporting our Educators

Improving HSSD's ability to compete in the teacher salary market to help ensure we attract, recruit, and retain top talent

Facility Maintenance

Bay Harbor

LED lighting

Forest Glen

Flag pole

Howard

Library flooring

Meadowbrook

Blacktop repairs

Suamico

Flag pole

Lineville

Replace motor drives

Bay View

Auditorium upgrades

Bay Port

Fence repairs

District Wide

Annual concrete repairs

Restroom toilet partitions

Roof repairs

Parking lot repairs

Above projects were completed in 2021

\$1,918,292

2018-2019

\$2,527,092

2019-2020

\$2,782,831

2020-2021

\$2,7658,272

2021-2022

Facility Maintenance

Addressing additional maintenance needs throughout the district

A Tale of Two Districts

EDUCATION

Schools launch Leadership SDLC, continuing La Crosse School District community engagement drive

For the Tribune | Oct 25, 2023

The School District of La Crosse and the La Crosse Public Education Foundation recently unveiled Leadership SDLC, a program aimed at deepening...



Strategy

- Create an opportunity for meaningful engagement with a single source of truth
- Recruit leaders for district service
 - Board of Education
 - Foundation Board
 - Referendum Task Force



Recap

- Principles
 - Context matters
 - Team up to simplify the complex
 - Consistency: year round
- Referendum
 - Four types of voters
 - Engage internally and externally
 - Open channels for feedback



THANK YOU
QUESTIONS?

Learn more about the Donovan Group at www.DonovanGroup.com

