

WASBO Facility Management Program

The Realities of Referendum Projects

Jeremiah Johnson, Chief Operations Officer, Muskego-Norway School District
jeremiah.johnson@muskegonorway.org



The 3 Year Journey...In One Hour!

- Master Planning/Capital Planning
- Hiring an Architect and Construction Team
- Engaging the Community
- Municipal Relations
- Construction
- Tracking Progress
- Cutting Ribbons

CONSTRUCTION TIMELINE

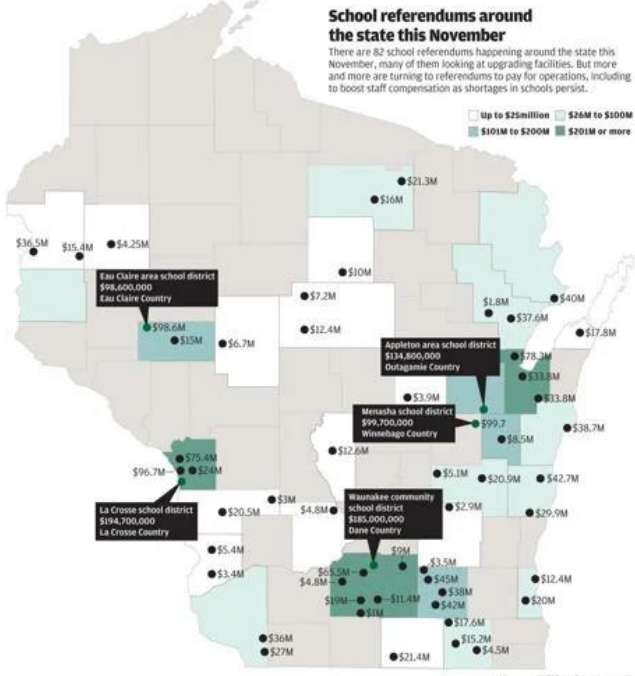
- 
- **SPRING 2023**
Construction trailers arrive on site
Groundbreaking
 - **SUMMER 2023**
Site work and utilities
Begin foundation/structure work
 - **FALL 2023**
Foundation/structure work
 - **SPRING 2024**
Building enclosure
 - **SUMMER 2024**
Interior finishes
 - **START OF 2024 SCHOOL YEAR**
Ribbon cutting

Wisconsin schools have highest number of referendums in 21 years

Olivia Herken Nov 8, 2022 3

What is a school referendum?

How many have been a part of leading one?



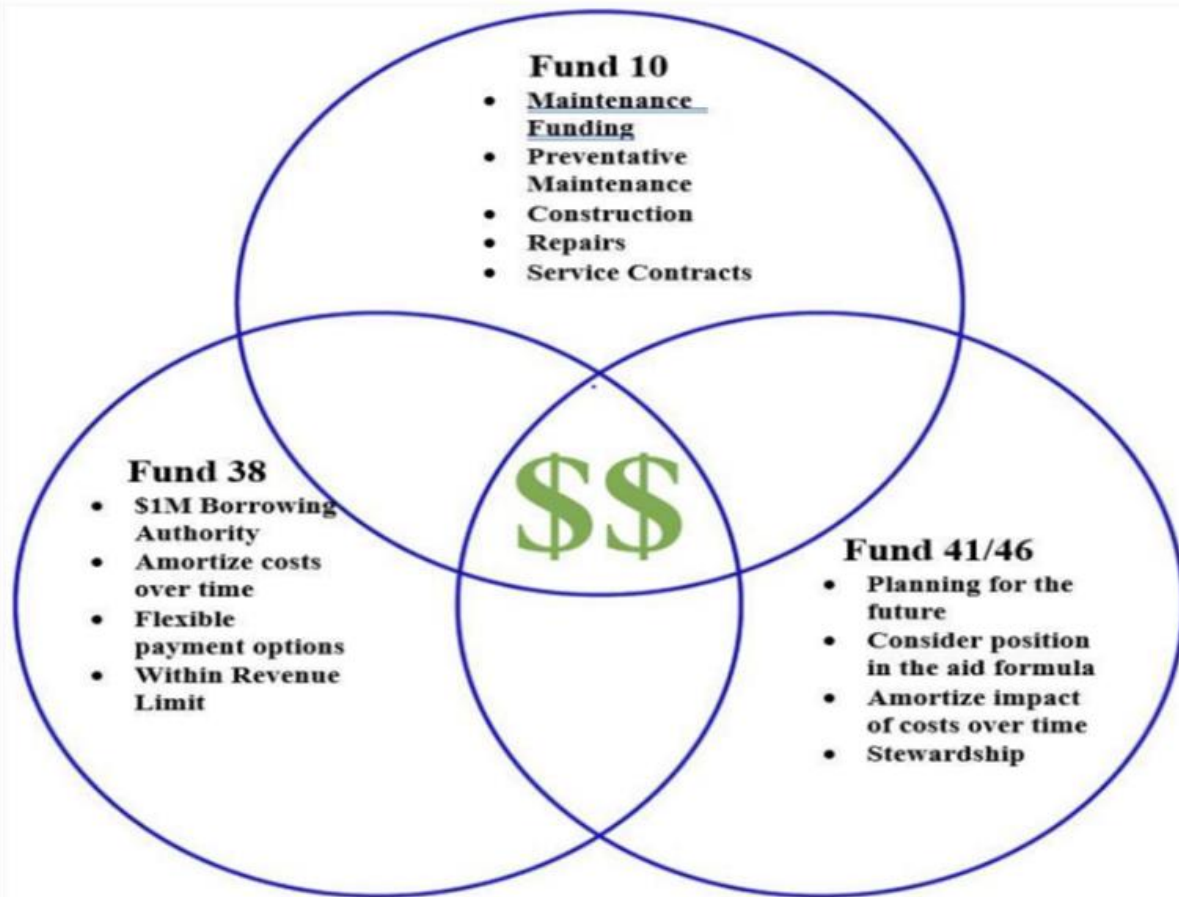
Your time to shine...or whine

Find time to listen to your stakeholders to understand what facilities services really matter most to them

www.value-based-fm.com



Planning for Capital Improvements



It All Starts With Capital Planning

Project Number	Project (brief description)	Building Code	(1) Health & Safety	(2) Laws & Regulations Code Updates	(3) Outdated Facilities / Program Changes	(4) Energy Savings	(5) Core Mission Needs	(6) Capacity	(7) Security	Total Weight	Original Estimate	Adjusted Estimate	Target Year	Date Completed
1121	REPAIR BASEBALL FENCING	ATH-885	0	0	2	0	0	0	0	2	8,000		UNPLANNED	
1090	MODIFY LIBRARY FOR BOOK ROOM	LD-887	0	0	0	0	0	2	0	2	5,000		UNPLANNED	
1068	REPLACE DAMAGED CEILING TILE	BL/CM-886	0	0	3	0	0	0	0	3	57000		UNPLANNED	
1083	PAINTING	LD-887	0	0	3	0	0	0	0	3	60,000		UNPLANNED	
1082	ADD WATER TO 5TH GRADE ROOMS	LD-887	0	0	3	0	0	1	0	4	12,000		UNPLANNED	
1079	CARPET REPLACEMENT-30 ROOMS	LD-887	0	0	4	0	0	0	0	4	90,000		2021	
1120	SOCCER SHELTERS FOR HOME VISITOR	ATH-885	1	0	4	0	0	0	0	5	40,000		UNPLANNED	
1076	PAINTING-AS NEEDED	BL/CM-886	0	0	5	0	0	0	0	5	60,000		UNPLANNED	
1124	INSTALL ASPHALT WALK TO GIRLS SOFTBALL FIELDS	ATH-885	1	0	5	0	0	0	0	6	30,000		UNPLANNED (CPC)	
1122	LIGHT TENNIS COURTS	ATH-885	2	0	2	0	1	0	1	6	40,000		UNPLANNED	
1113	ADDITIONAL OFFICE SPACE FOR MHS COACHES	ATH-885	0	0	3	0	0	3	0	6	50,000		UNPLANNED	
1115	CONSTRUCT STORAGE UNDER FB BLEACHERS	ATH-885	0	0	1	0	0	5	0	6	50,000		UNPLANNED	
1103	RECORDS STORAGE-ADD MEZANINE	ESC-889	0	0	0	0	0	5	1	6	25,000		UNPLANNED	
1126	REPAIR BASEBALL WARNING TRACKS	ATH-885	1	0	5	0	0	0	0	6	0		2017	
1111	REPLACE FOOTBALL FIELD FENCING	ATH-885	1	0	5	0	0	0	1	7	35,000		UNPLANNED	
1002	BATHROOM STALLS AND FIXTURES	LV-881	0	0	0	3	4	0	0	7	65,000		2024	
1066	SOFTENER REPLACEMENT	BL/CM-886	3	0	4	0	0	0	0	7	22,000		2018	
1001	ARSENIC TREATMENT/SOFTENER REPLACEMENT	LV-881	4	4	0	0	0	0	0	8	50,000		UNPLANNED	
1107	POOL PLATFORM/SCORING DECK	ATH-885	0	0	5	0	3	0	0	8	23,000		UNPLANNED	
1112	RECONSTRUCT VISITOR LOCKER ROOM	ATH-885	0	0	3	0	0	5	0	8	45,000		UNPLANNED	
1129	REPLACE CARPETING IN ROOMS 245, 244, 241	HS-888	2	0	5	0	1	0	0	8	5,000		2018	
1106	SECURITY ENHANCEMENTS-ADD CAMERAS	ESC-889	4	0	0	0	0	0	4	8	0		2016	
1072	FIRE PANEL REPLACEMENT	BL/CM-886	3	3	3	0	0	0	0	9	18,000		UNPLANNED	



2015

- 8 Schools, 5000 Students
- 3 Schools Built in 1900-1924
- Over \$25M in Capital Needs - with a \$400,000 annual budget
- Voters Shot Down Two Referendums in 2010 & 2011
- ***\$1M to repair Weight Room***



Levy to be reduced following plasma TV flap

By Wire-Data Stream Apr 27, 2005 0



MUSKEGO - After the school superintendent called purchase of big-screen plasma televisions for a high school cafeteria a huge mistake, the Muskego-Norway School Board voted to give back to taxpayers about \$200,000 left over from renovating the school.

Superintendent Richard Drury said Monday's action would reduce next year's tax bills by about 8 cents per \$1,000 of assessed value, or \$16 on a home worth \$200,000.



- Consider Past Projects & What Went Well/Poorly
- Consider Public Perception & Timing
- Consider Funding & Debt Cliff
- Fund 46?
- School Board Appetite

Owner's Representative

- Consider your capacity and expertise
- Consider potential ROI by utilizing an owner's representative
- Establish fees, and bring in early





RFQ & RFP (Request For Qualifications/Proposal)



Architect & Construction Manager (CM vs GC)

- RFQ to Prescreen
- RFP To Shortlist & Interview
- Site Visits to Other Projects & Reference Checks
- Interview and Establish % of Cost
- Who will be your team 2 years from now?
- How can they market your approach?
- Don't be wooed by who lives in your community

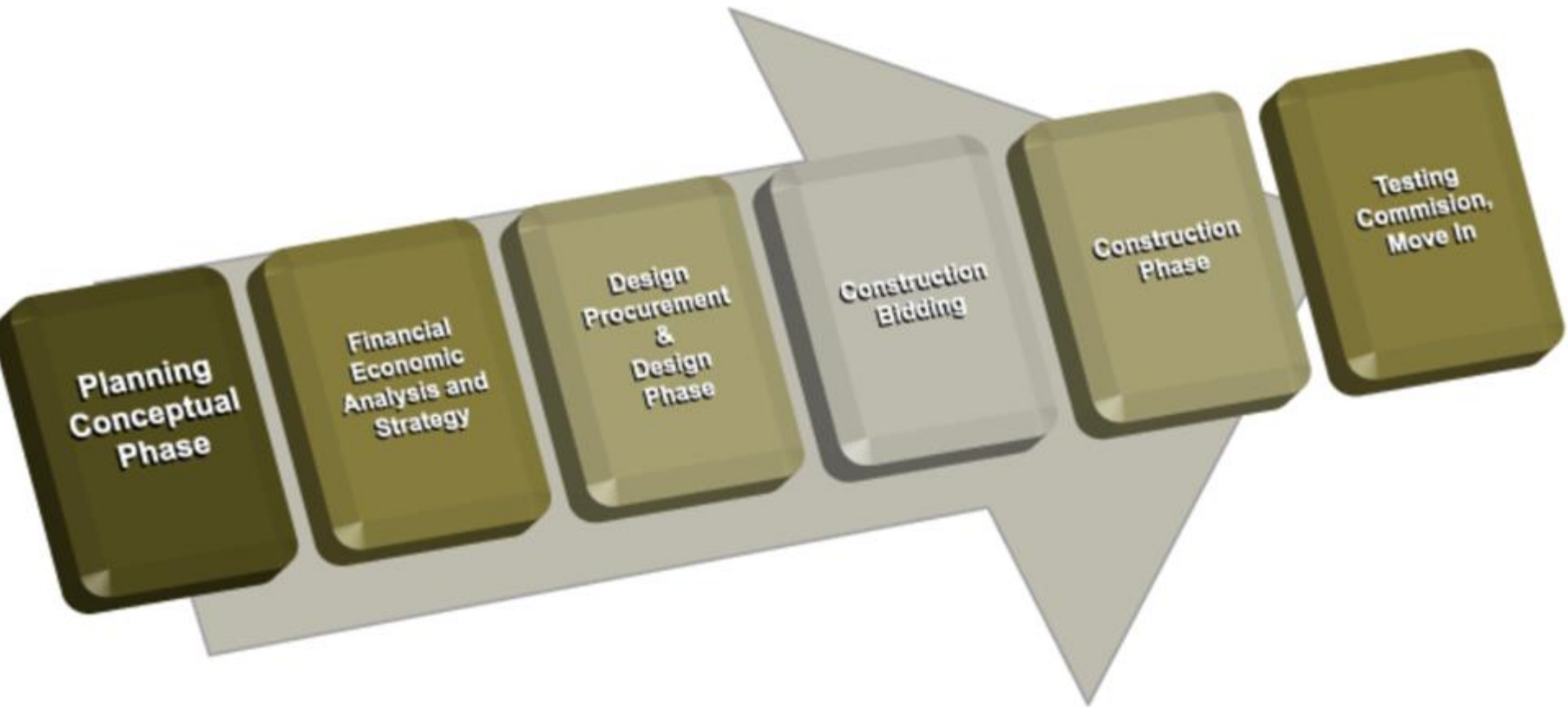


Balancing Act

Architect vs Construction Manager

- How will they communicate with each other
- Are they on the same page with solutions
- Tension can be good when looking for the best approach
- DO take copious notes, or require the team to take minutes







Engaging the Community?

6 Months

- Board Commission a Community Committee
- Schedule Tours of Schools (Know Your Stuff!)
- Balance the Audience
- Invite Departments/Coaches to explain the need
- Facilitate Narrowing Exercises
- Survey Community on a variety of solutions, but be specific & TRUST the data!





Messaging....BE CAREFUL

- Land on a Solution
- Brand the Campaign
- Get Ready To Get Picked On...only 50% generally support
- Social Media & [Videos](#) are great tools



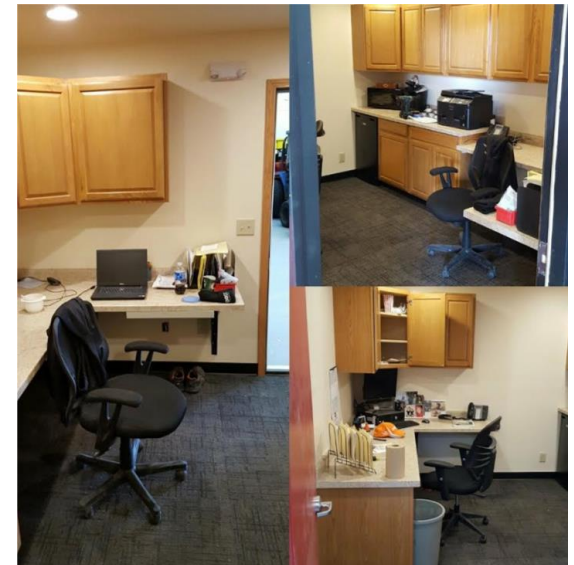
1130 WISN News/Talk 1130 WISN
March 10, 2016

An exclusive report from Dan O'Donnell: Muskego-Norway Superintendent Kelly Thompson violated District policy and appears to have violated state law.

MUSKEGO NORWAY SCHOOLS
Muskego Superintendent Violates Own Policy, Possibly State Law in Campaigning for Referendum
An exclusive report from Dan O'Donnell: Muskego-Norway School District Superintendent Kelly...
NEWSTALK1130.COM

21 Likes 7 Comments 51 Shares

Share





Who is most successful?

Certain characteristics of school districts are connected with high success rates!

- **Overall Accountability Score:** The higher the school district overall accountability score from DPI, the greater the chance of referendum success. It is all about Literacy and Math!!!
- What does your report card say?



Does the question matter?

Certain bond questions are connected with higher success rates!

- Bond referendum questions coded as ***construction and renovation, capital improvements, or safety and security*** proved to be more successful!
 - 65.8% success of all bond questions between 2011 and 2016.
- Bond questions coded as ***technology*** and ***transportation*** were less successful :(



The VOTE

- Inform as many groups as possible
- Yes/No Groups
- Board Passes Resolution
- Sets the date (Primary, Local or Presidential)



\$34 million Muskego-Norway School District referendum fails

Journal Times staff Nov 2, 2010 0

WE LISTENED | Not to Exceed \$43,180,000

Proposed Projects	Budget
New Middle School on District Owned Land	\$ 31,305,000
Mill Valley Elementary School – Additions and Renovations	\$ 10,005,000
Lakeview Elementary School – Parking Lot Expansion & Playground Relocation	\$ 450,000
Bay Lane / Country Meadows School – Renovation	<u>\$ 3,420,000</u>
Total Project Cost:	\$ 45,180,000
Use of District Fund Balance	<u>(\$ 2,000,000)</u>
Total Referendum Cost:	\$ 43,180,000



MUSKEGO • NORWAY SCHOOLS

SHARE THE VISION DISTRICT OF CHOICE

You Passed! Hurry Up And Design!

- Include Staff in Design/Tours
- Include your “Must Haves”
- Consider Bidding Alternates
- Renderings build Excitement
- When to Release Contingency?



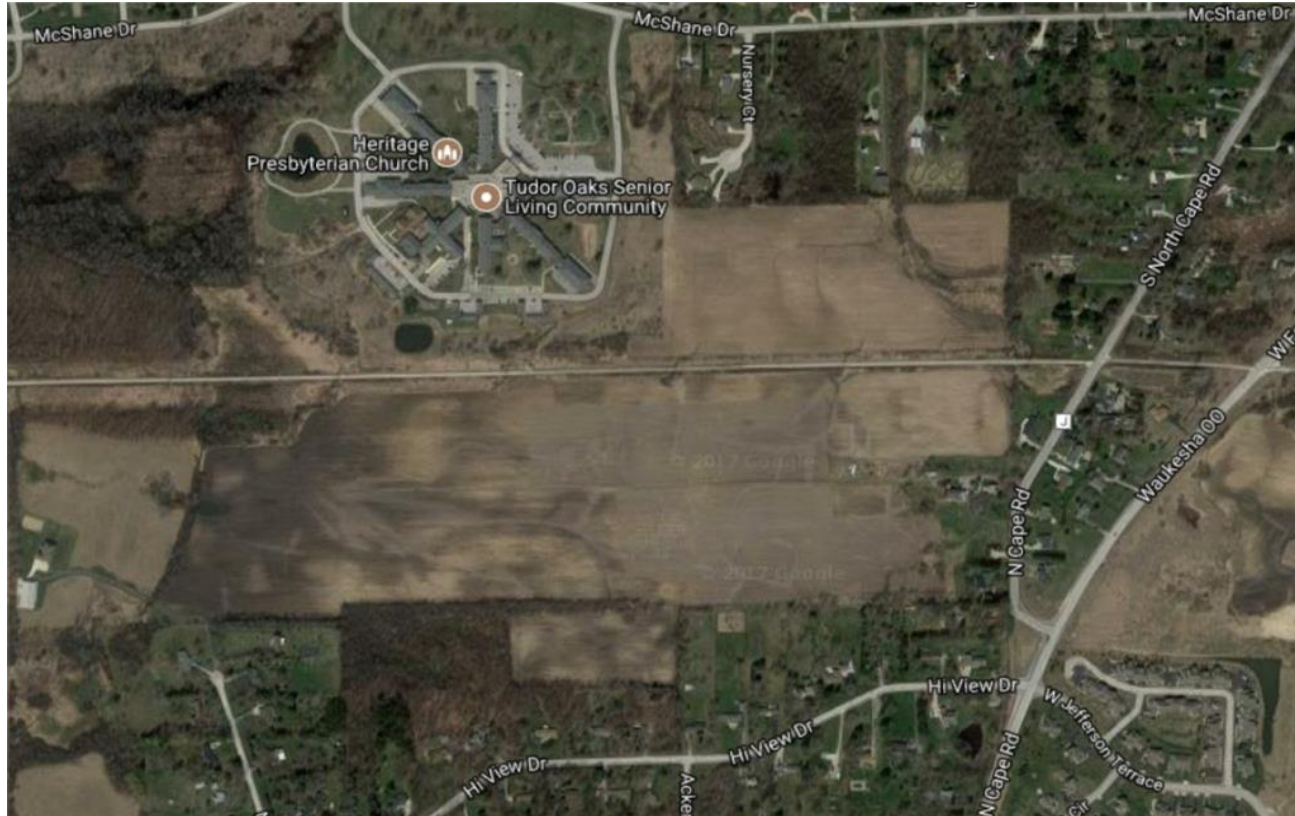


Legal & Real Estate

- Eminent Domain Laws
- Acquiring or Selling Property
- Utilities/Recapture Agreements
- Easements



Wait...What about the Municipality





Muskego-Norway Buildings & Grounds



Sep 25, 2022 · 🌐

Below are some of the exterior renderings and site plan that have been submitted to the City for Plan Commission review for the upcoming MHS expansion.



[See insights and ads](#)

[Boost post](#)

53

10 comments · 18 shares



Muskego-Norway Buildings & Grounds



1d · 🌐

1st sign of construction....arrival of the trailer! We are working through our last bid package approval, and will be full STEAM ahead, come spring(like ... [See more](#)



[See insights and ads](#)

[Boost post](#)

56

5 comments

Construction



- Control Costs (Change Orders)
- On-site Progress Meetings/Lunch with Contractors
- Furniture Ordering & Playgrounds
- Inform Neighbors & Enforce Ordinances
- Have Architects continue to be a part of meetings and address RFI's
- Punchlists



Balancing Act

- How will your Department function, and who can step up?
- Who is your internal team?
- Who will make final decisions?
- How will you track commitments?
- Who will need to be at meetings?

Sound Stewardship of Resources - Action Steps specific to Building Projects				
Outcome Measure	Action Steps/Milestones	Lead Person Responsible	Expected Date of Completion	Complete
Attendance Boundary	Determine Options - Survey Parents	Kelly, Julie, Jeff	7/29/2016	3
	Options to board	Kelly, Julie, Jeff	8/18/2016	3
	Options to public	Kelly, Julie, Jeff	9/30/2016	3
	Align with APL's study	Kelly, Julie, Jeff	9/30/2016	3
	Board Approval	Kelly, Julie, Jeff	10/30/2016	3
	Communicate to Community	Kelly	11/30/2016	3
	Intra district Requests for "grandfathering"	Jeff	Spring 2018	
	In 2017-18, are intra-district families aware of new attendance boundaries and will they choose to attend the same school they are requesting?	Jeff	Spring 2017	
MDROffers Consulting	Julie - 3rd Opinion	November, 2016	NA	
Community Engagement	Neighborhood Meeting for New MS-Door Hangers	SL, Bray, Kapur, CG, Tudor	November, 2016	3
Transitions to merge schools and start up new school	naming CM, MV and new School (mascots)	Jeff and Principals	Spring 2017	
	Staff transitions - option for changing schools	Jeff	1/31/2018	
	Parent transitions	Jeff and Principals	begin spring 2017	
	Student transitions	Jeff and Principals	begin spring 2017	
	Communications	Jeff and Principals	begin spring 2017	
Staffing Plan	Teacher	Jeff	3/1/2017	
	Aides/AAs	Julie	3/1/2017	NA
	custodial	Jeremiah	3/1/2017	3
Selling ME and TC (New Property?)	Brokers - meet to discuss timeline, costs - Dickman, Sal, Anderson Commercial	Julie	9/30/2016	3
	Broker to sell west end of new MS? (Determined in wetland delineation)	see below		
	Broker Proposal- Anderson	Julie	11/5/2016	3
Connectivity New School	Engineering	Tony	11/30/2016	
	Funding	Tony	7/17/2017	
	Installing	Tony	TBD - Board Approval	
Technology CM, MV and new School	Classroom equipment selection	Tony	8/1/2017	
	Staff devices selection	Tony	8/1/2017	
	Student devices selection	Tony	8/1/2017	
	Networking equipment selection	Tony	11/1/2017	
Finances for Projects	Investments	Julie	7/5/2016 and ongoing	
	Project Budget Management	Julie		
	Change Orders	Julie/Jeremiah		ongoing
	Approvals from Board	Julie		ongoing
	Contract Signatures	Julie		ongoing
	Cost Control Log 8/30/16	CG		9/30/2016
	Updated CCL 10/3/16	CG		10/3/2016
	Traffic Study Proposal	Traffic Analysis & Design		10/7/2016
	Updated CCL 10/17/16	CG		10/17/2016
	Change Order for Borings	Bray/PSI		10/21/2016
Focus On Energy				

Construction Video/Ribbon Cutting



*Introducing
Muskego Lakes Middle School*

JOIN US FOR A
RIBBON CUTTING &
OPEN HOUSE
ON
TUESDAY, AUGUST 14, 2018
5:00 PM - 7:00 PM

THE ENTIRE MUSKEGO-NORWAY COMMUNITY IS INVITED TO ATTEND THE GRAND OPENING OF MUSKEGO LAKES MIDDLE SCHOOL. RIBBON CUTTING CEREMONY WILL BE FOLLOWED BY SELF-GUIDED TOURS. LIGHT REFRESHMENTS WILL BE PROVIDED IN THE CAFETERIA.

The poster features a top section with an architectural rendering of the school building under a blue sky with birds. The bottom section contains aerial views of the school campus and a large red circular seal in the background.

