



# Referenda Success: Timing is Everything

**2012 WSPRA Fall Conference**

**Thursday, November 8, 2012**

Presented by:

**Kit Dailey, *Eppstein Uhen Architects (EUA)***

**&**

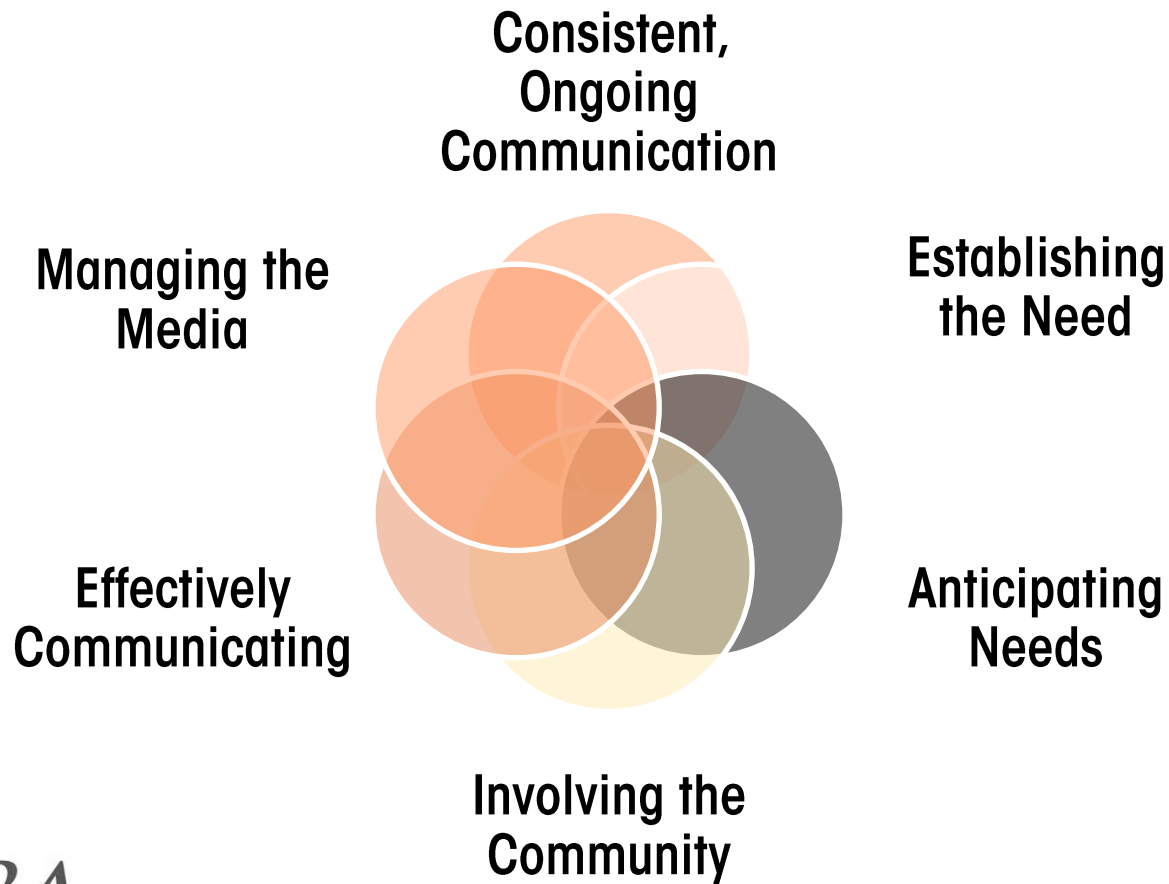
**Joe Quick, *Wisconsin Association of School Boards (WASB)***



eppstein uhen : architects



# Proactive Planning





## It starts with a plan.

### **When is your target referendum date?**

- Do you have a revenue limit expiring or debt dropping off in the near future?
- How many regularly scheduled elections are in the near future?
- How long can you wait before you absolutely need approval?



# Avoid last minute decisions.

## Is this the right time?

- Evaluate timing around calendar
- Assess impact of board elections/other local, state and national ballot issues
- Consider time needed to produce & distribute info materials
- Provide adequate time for citizens committees to organize and implement strategies

# When is the Best Time to go?

## Regular or Special Election?

### Wisconsin School Referendum: 2000-Present

	Issue Debt			Nonrecurring			Recurring		
	Pass			Pass			Pass		
Election	Failed	Passed	Percentage	Failed	Passed	Percentage	Failed	Passed	Percentage
February	38	55	59.1%	24	24	50.0%	25	16	39.0%
April	140	123	46.8%	96	106	52.5%	85	42	33.1%
September	18	18	50.0%	11	14	56.0%	8	5	38.5%
November	44	78	63.9%	21	32	60.4%	18	17	48.6%
Special	96	68	41.5%	27	50	64.9%	49	31	38.8%

# When is the Best Time to go?

## Presidential Election Year?

### Wisconsin School Referendum: 2000-Present

Election	Issue Debt			Nonrecurring			Recurring		
	Failed	Passed	Percentage	Failed	Passed	Percentage	Failed	Passed	Percentage
<b>Presidential Election</b>	<b>89</b>	<b>129</b>	<b>59.2%</b>	<b>47</b>	<b>65</b>	<b>58.0%</b>	<b>54</b>	<b>46</b>	<b>46.0%</b>
2000	45	67	59.8%	16	17	51.5%	23	26	53.1%
2004	17	32	65.3%	9	16	64.0%	13	10	43.5%
2008	27	30	52.6%	22	32	59.3%	18	10	35.7%
<b>Non-Presidential Year</b>	<b>249</b>	<b>212</b>	<b>46.0%</b>	<b>137</b>	<b>166</b>	<b>54.8%</b>	<b>132</b>	<b>64</b>	<b>32.7%</b>
2001	49	35	41.7%	13	16	55.2%	33	20	37.7%
2002	35	24	40.7%	13	11	45.8%	18	2	10.0%
2003	44	13	22.8%	13	8	38.1%	24	5	17.2%
2005	25	17	40.5%	14	16	53.3%	13	10	43.5%
2006	21	40	65.6%	22	32	59.3%	11	10	47.6%
2007	25	31	55.4%	18	22	55.0%	14	9	39.1%
2009	14	13	48.1%	16	19	54.3%	10	2	16.7%
2010	16	26	61.9%	18	19	51.4%	8	2	20.0%
2011	20	13	39.4%	10	23	69.7%	1	4	80.0%



# What's New? - Changes to Wisconsin Law

## New Fall Primary Date

- Changed from the 2nd Tuesday in September to the 2nd Tuesday in August.

## Earlier Deadline for Filing Ballots

- Referendum questions must now be filed with the county clerks *no later than 70 days prior* to the referendum election.
- Prior law required ballots to be filed no later than 42 days prior to the election.



# Regularly Scheduled Referendum Dates

Spring	2012	2013
Resolution Needs to be approved by	12/13/2011	12/11/2012
Primary	02/21/2012	02/19/2013
Resolution Needs to be approved by	01/24/2012	01/22/2013
General	04/03/2012	04/02/2013
<b>Fall</b>		
Resolution Needs to be approved by	06/05/2012	<i>70 days prior</i>
Primary	08/14/2012	<i>Special Election</i>
Resolution Needs to be approved by	08/28/2012	<i>70 days prior</i>
General	11/06/2012	<i>Special Election</i>





# Anticipate questions.

## How long will it take to do your homework?

- Establish referendum vision statement
- Review & prioritize educational program needs
- Review & prioritize facility needs
- Update enrollment data (outside source if possible)
- Identify potential options, scenarios, reductions



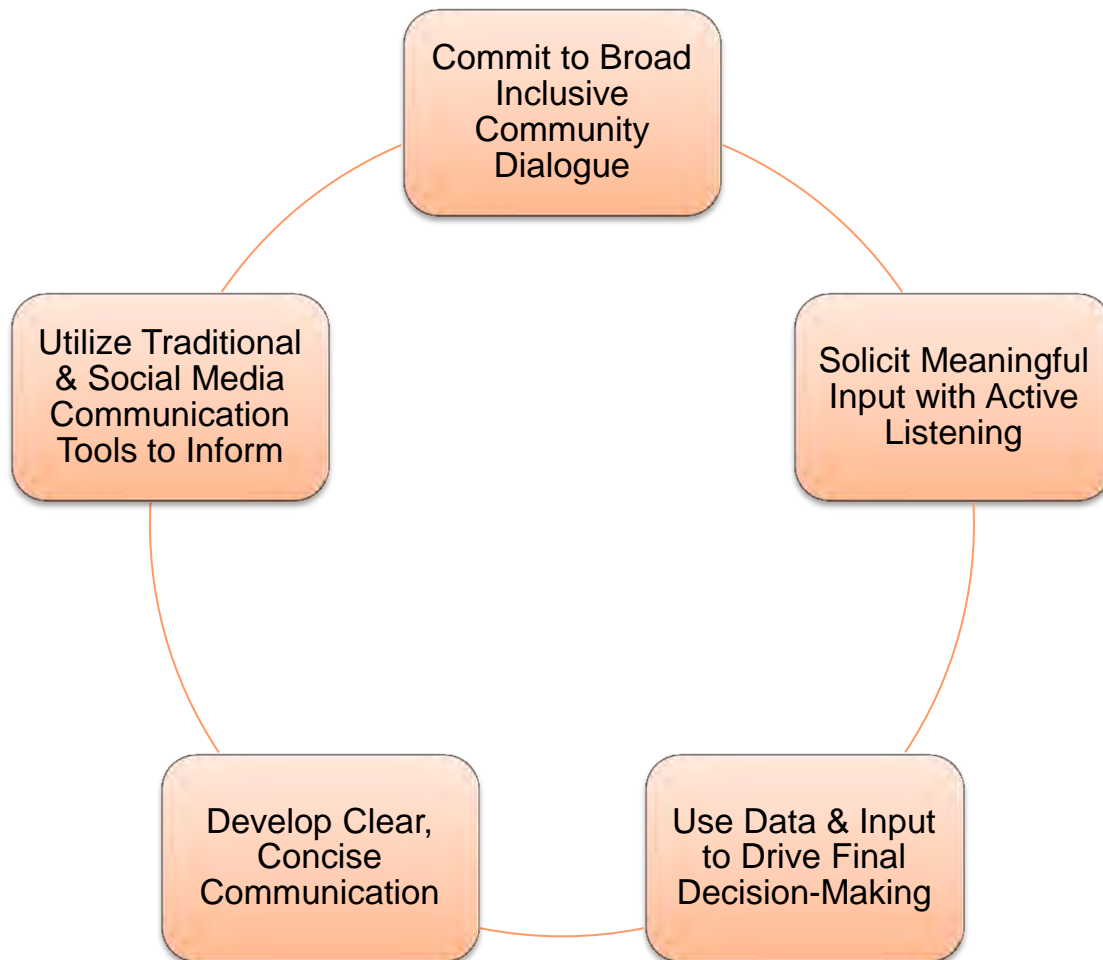
**Be realistic.**

## **How quickly can your Board make decisions?**

- Establish priorities
- Assess findings & feedback
- Evaluate options
- Reach consensus
- Prepare for campaign



# Leave time to engage the community.





## Conceptual Referendum Timeline – Spring 2014: Part I

Identify District Needs, Potential Referendum Options



Fall 2012



## Conceptual Referendum Timeline – Spring 2014: Part I

Identify District Needs, Potential Referendum Options



Develop Key Messages, Define Community Engagement Approach



Fall 2012

Winter 2013



## Conceptual Referendum Timeline – Spring 2014: Part I

Identify District Needs, Potential Referendum Options



Develop Key Messages, Define Community Engagement Approach



Fall 2012

Educate & Engage Residents in Community Discussion on Needs



Winter 2013

Spring 2013



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Identify District Needs, Potential Referendum Options



Develop Key Messages, Define Community Engagement Approach



Fall 2012

Educate & Engage Residents in Community Discussion on Needs



Winter 2013

Evaluate Feedback, Prioritize Needs & Solutions



Spring 2013

Late Spring 2013



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Spring 2013

Focus Plan, Prepare Community-Wide Survey



Late Spring 2013

Summer 2013





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Focus Plan, Prepare Community-Wide Survey



Late Spring 2013

Launch Survey Outreach with Back-to-School Activities



Summer 2013

September –  
October  
2013



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Identify District Needs, Potential Referendum Options



Develop Key Messages, Define Community Engagement Approach



Fall 2012

Educate & Engage Residents in Community Discussion on Needs



Winter 2013

Evaluate Feedback, Prioritize Needs & Solutions



Spring 2013

Focus Plan, Prepare Community-Wide Survey



Late Spring 2013

Launch Survey Outreach with Back-to-School Activities



Summer 2013

Review Survey Findings



September –  
October  
2013

November 2013



## Conceptual Referendum Timeline – Spring 2013: Part II

**Decision Point: Go or No Go in February (2/18) or April (4/1) 2014**

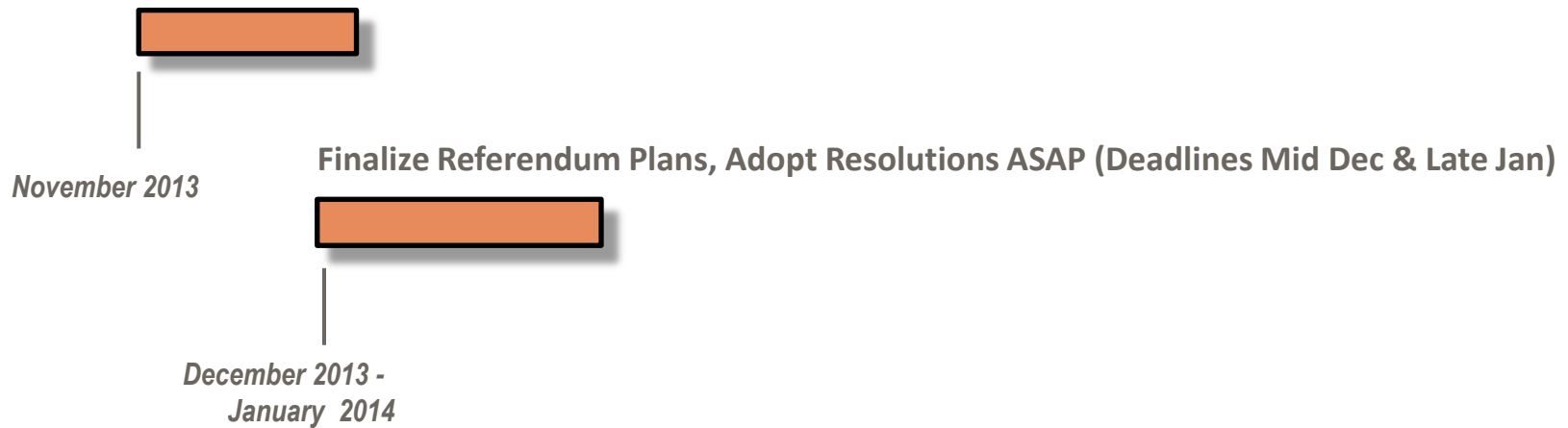


*November 2013*



## Conceptual Referendum Timeline – Spring 2013: Part II

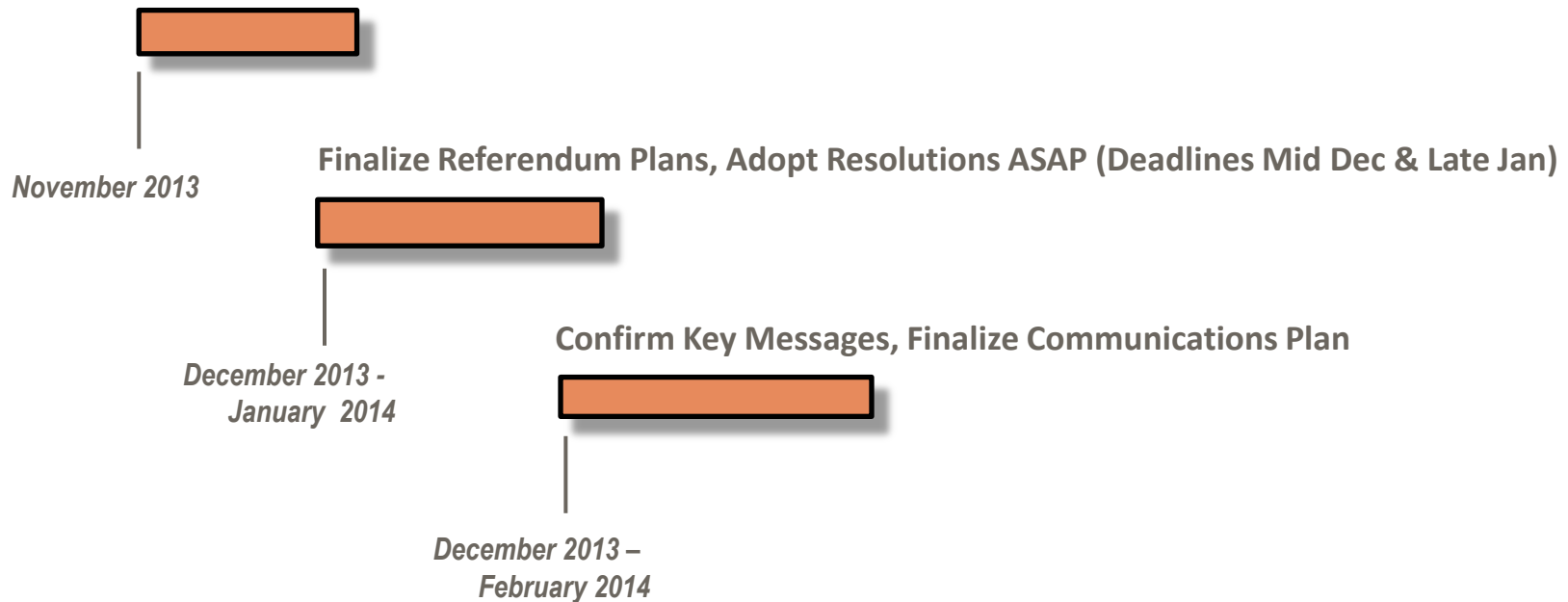
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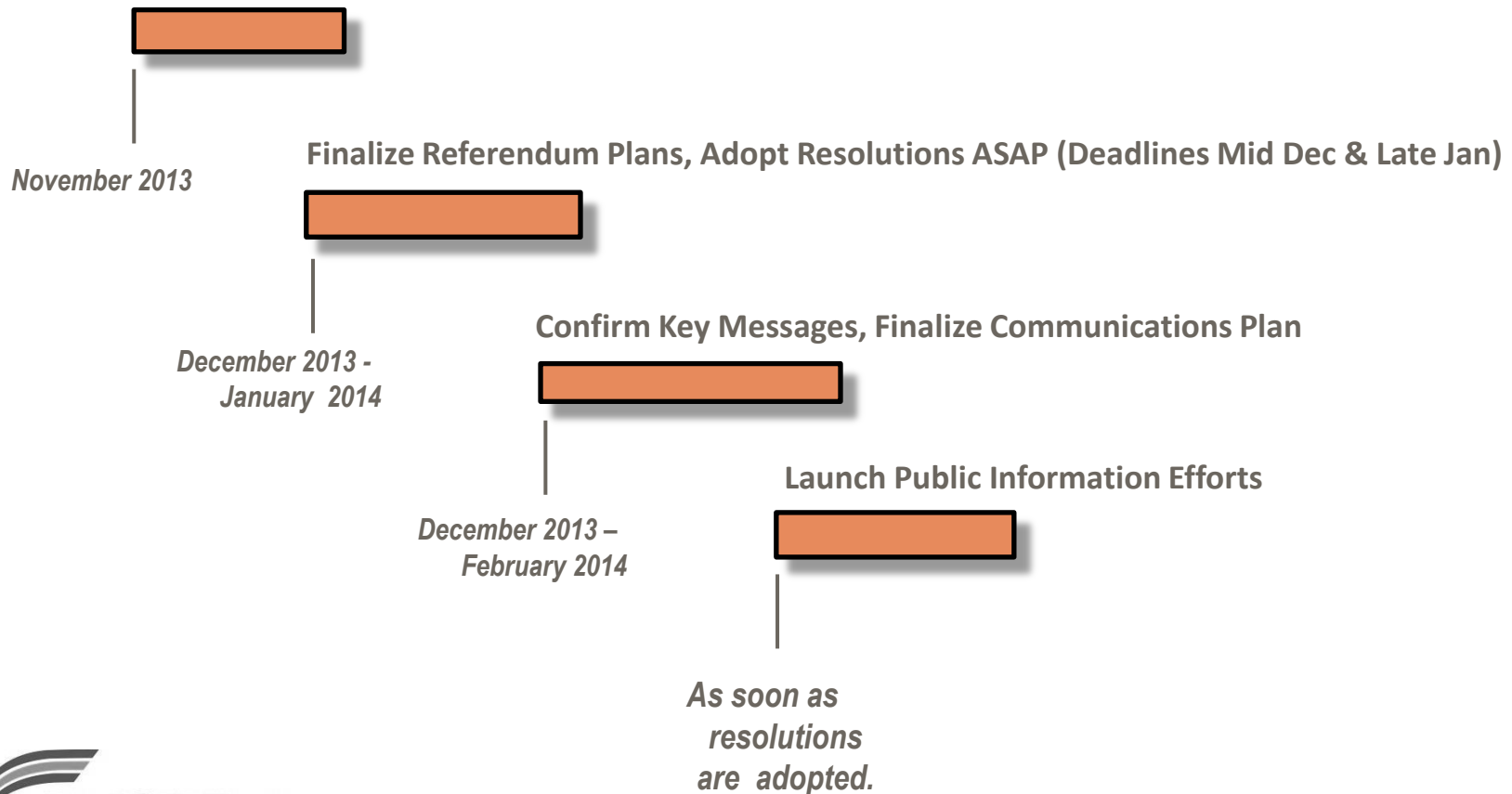
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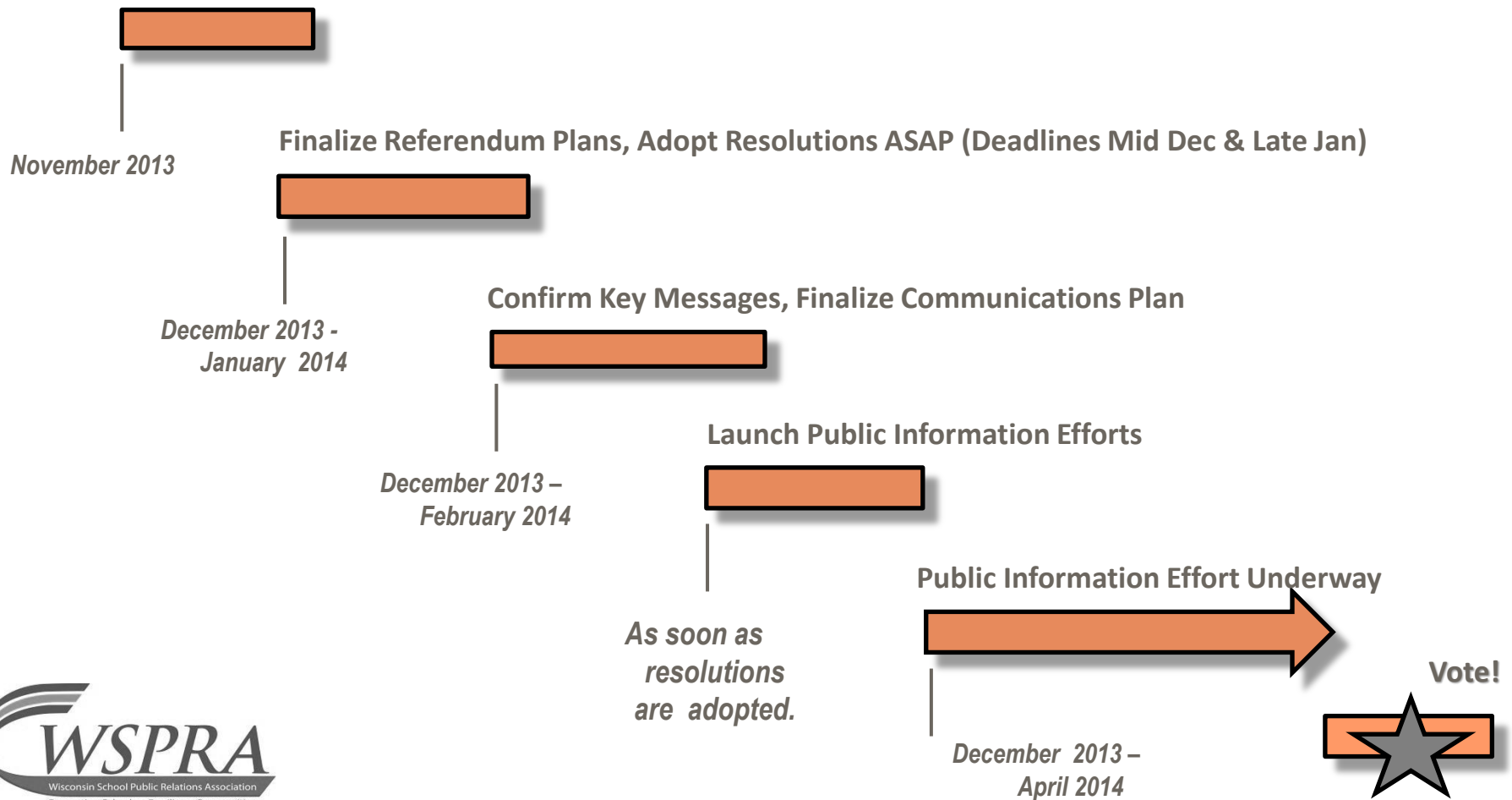
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**Decision Point: Go or No Go in February (2/18) or April (4/1) 2014**







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## Referendum Resource Center

*Thinking about going to referendum? The WASB Referendum Resource Center provides a series of WASB resources and links to other organizations to help boards understand the steps that are needed throughout the referendum process. Contact the WASB with any questions.*

*Note: Please keep in mind that sample materials from Wisconsin school districts are included for demonstration purposes. They should be carefully reviewed and adapted to meet the needs of your district.*

### Step One—Identify District Needs & Potential Referendum Options

*(1-3 years before referendum)*

At least one year before going to referendum, a district should clearly identify its needs and explore its referendum options.

- [Types of Referendums](#)
- [General School District Referendum Information](#)
- [WASB School District Legal Guide to Referendums](#)
- [DPI Referendum Information](#) (includes history of school district referendum results and DPI procedures and reporting requirements)
- [WASB Organizational Consulting Services](#)
- [WSPRA Conceptual Referendum Timelines](#)
- [School Enrollment Projection Services: UW Applied Population Laboratory](#)



### Step Two—Develop Key Message; Define Community Engagement Approach

### Step Three—Educate & Engage District Residents

### Step Four—Formal Board Action

### Step Five—Ongoing Public Information Effort Continues





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## Step Two—Develop Key Message; Define Community Engagement Approach

*(1 year – 18 months before referendum)*

Once you've decided to explore the possibility of going to referendum, you'll need to develop a plan to gauge your community's support.

- [WASB Strategic Planning Services](#)
- [WASB Community Engagement Resources](#)





## Step Three—Educate & Engage District Residents

*(6 months – 1 year before referendum)*

Engaging district residents should be an ongoing effort involving all aspects of school district governance.

- [WASBO/WASB/WSPRA Edventures School Finance Engagement Services](#)
- Sample Referendum Materials from Wisconsin School Districts

***Please keep in mind that sample materials from Wisconsin school districts are included for demonstration purposes and are not necessarily recommended or endorsed by the WASB. When using sample materials from other Wisconsin school districts as an information resource, please keep in mind that such materials should be used as examples only. They should be carefully reviewed and adapted to meet the needs of your district.***





## Step Four—Formal Board Action

*(3-6 months before referendum)*

Setting a referendum data requires formal board approval. Understand your options and the specific statutory requirements.

- WASB Legal Resources
  - [General School District Referenda Information](#)
  - [WASB School District Legal Guide to Referendums](#)







## Step Five—Ongoing Public Information Effort Continues

*(0-3 months before referendum)*

Getting the approval of voters for a referendum requires communication and education. Voters need to clearly understand the needs of your district and what is being asked of them, and board members need to know clearly what they can say and do, and what they cannot.

- Review communication and engagement efforts from Steps Two and Three
- WASB Legal Resources
  - [Using Public Funds for Political Purposes](#)
  - [Board Advocacy of Referenda, Candidates](#)
  - [Politics and School Board Members](#)
  - [State Statutes](#)





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# Referenda Success: Timing is Everything

## Thank You!

*Presented by:*

**Kit Dailey, Public Information Specialist**

[kitd@eua.com](mailto:kitd@eua.com)

414-232-0246

**Joe Quick, Government Relations Specialist**

[jquick@wasb.org](mailto:jquick@wasb.org)

608-512-1716



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