

WASBO Facility Management Program- Module 5

The Realities of Referendum Projects

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Our Stories

Suburban Example:

- 8 Schools, 5000 Students
- 3 Schools Built in 1924
- Over \$25M in Capital Needs
- Voters Shot Down Two Referendum questions in 2010
- Voters Approved \$43M Referendum in 2015
- Construction 2016-2018, Consolidating to 6 Schools
- A lot Didn't make the Cut





Learning Targets

- What is Facilities Referenda?
- Balancing your time
- The Role of a Construction Manager
- The Role of an Architect
- Engaging your community
- The construction Process



Our Stories

Rural Example:

- 4 Schools, 3 Charter Schools, 2000 Students
- Middle School built in 1939
- Over \$25M in Capital Needs
- Voters Approved \$29.1M Facility and \$500K Operating Referendum in 2014
- Construction 2015-2016, Consolidated Middle/High School



Our Stories

Urban Example:

- 41 Schools, 22,000 Students
- Several buildings over 100 years old
- Over \$400M in Capital Needs
- Voters Approved \$68.25M Facility and \$16.5M Operation Referendum in 2017
- Construction 2017-2020, Secure Entrances, Fine Arts, New Elementary School




The Journey...In One Hour!

- Master Planning/Capital Planning
- What Is Your Role?
- Hiring an Architect and Construction Team
- Engaging the Community, Identifying the Need, Getting Input
- Engaging Staff
- Municipal Relations
- Breaking Ground
- Tracking Progress
- Cutting Ribbons

It All Starts With Capital Planning

- ID Needs & Costs
- Stakeholder Feedback
- Funding Level?
- Equipment Lifecycle?
- Engage Board

Collapsed Weight Room....

Building Codes		MISSION: EVERY STUDENT LEARNING, GROWING & SUCCEEDING CORE COMPETENCY: SOUND STEWARDSHIP OF RESOURCES												
LV-881												5-Severe Impact		
MV-882												4-High Impact		
ME-883												3-Moderate Impact		
TC-884												2-Minor Impact		
BL/CM-886												1-Long Range Implication		
LD-887												0-No Impact		
Project Number	Project (brief description)	Building Code	PROJECT RANK										Target Year	Date Completed
			(1) Health & Safety	(2) Laws & Regulations Code Updates	(3) Outdoor Facilities / Program Changes	(4) Energy Savings	(5) Core Mission Needs	(6) Capacity	(7) Security	Total Weight	Original Estimate	Adjusted Estimate		
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	57,000		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	

Learning From The Past

- Consider Past Projects & What Went Well/Poorly
- Consider Public Perception & Timing
- Consider Funding
- Fund 46/Energy
- Tax Impact
- Falling Debt?

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.



The BIG BLACK FRIDAY sales event

NEW 2017 CHRYSLER PACIFICA TOURING PLUS (1422 Miles, 1422 Miles) (Car) (Car)

0% financing for 72 months + \$1,000 cash back

OR

\$2,500 REBATE + \$1,000 CASH + \$500 CASH BACK

\$27,900

MARTIN Jeep RAM

1422 Miles (Car) (Car) 26

1% financing and CCAP rebate is approved credit. Most leases through CCAP. (Days minimum amount to finance credit. 0% APR is 72 mos. = \$11.11 per \$1,000 financed. qualify for 0% financing. Address, etc. is, with financing by per 12 mos. option



Legal & Real Estate

- Review Contracts
- Eminent Domain Laws
- Acquiring or Selling Property
- Board Governance & Meetings Laws
- Recapture Agreements
- Easements





RFQ & RFP (Request For Qualifications/Proposal)

Architect

- RFQ to Prescreen
- RFP To Shortlist & Interview
- Site Visits to Other Projects?
- Interview and Establish %
- Who will be your team 2 years from now?
- What communication strategies are you looking for?
- How can they market your approach?



RFQ & RFP (Request For Qualifications/Proposal)



Construction Manager

- RFQ to Prescreen
- RFP To Shortlist & Interview
- Site Visits to Other Projects?
- Don't be fooled by the suits
- Don't be wooed by who "Lives in your Community"
- DO Call around and get feedback
- Who will be your team 2 years from now?



You Can Build on That



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
- **Designs in pre-referendum are heavily conceptual**
- Include your must haves (HVAC, Roofs & Floors)
- CM job is to project the budget as accurately as possible
- Contingency Matters...but how much?
- Alternates on bid day can save elements of the project



Balancing Act-Your Time

Expect large projects to take 25% of your time, and up to three years

- 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?
- How will you engage staff in the projects?
- Who will be the facility leader at the new building?

Sound Stewardship of Resources - Action Steps specific to Bulking Projects				
Outcome Measure	Action Steps/Milestones	Lead Person Responsible	Expected Date of Completion	Complete
Attendance Boundary	Determine Options - Survey Parents	Kelly, Julie, Jeff	7/28/2016	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
Community Engagement	Intra district Requests for "grandfathering"	Jeff	Spring 2016	
	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	
	MDO/Offices Consulting	Julie - 3rd Opinion	November 2016	NA
Transitions to merge schools and start up new school	Neighborhood Meeting for New MS - Click Here	SL, Bray, Kapur, CO, Tudor	November 2016	3
	Training CM, MV and new School (masscos)	Jeff and Principals	Spring 2017	
Staffing Plan	Staff transitions - option for changing schools	Jeff	1/31/2016	
	Parent transitions	Jeff and Principals	begin spring 2017	
	Student transitions	Jeff and Principals	begin spring 2017	
	Communications	Jeff and Principals	begin spring 2017	
Selling ME and TC (New Property?)	Teacher	Jeff	3/1/2017	
	Aides/Asst	Julie	3/1/2017	NA
Connectivity New School	subtotal	Jeremiah	3/1/2017	3
	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		
Technology CM, MV and new School	Broker Proposal - Anderson	Julie	11/5/2016	3
	Engineering	Tony	11/30/2016	
	Funding	Tony	7/17/2017	
	Installing	Tony	TBD - Board Approval	
	Classroom equipment selection	Tony	8/1/2017	
Finances for Projects	Staff device selection	Tony	8/1/2017	
	Student device selection	Tony	8/1/2017	
	Networking equipment selection	Tony	11/1/2017	
	Investments	Julie	7/6/2016 and ongoing	
Focus On Energy	Project Budget Management	Julie		
	Change Orders	Julie/Jeremiah	ongoing	
	Approvals from Board	Julie	ongoing	
	Contract Signatures	Julie	ongoing	
	Cost Control Log 8/30/16	CO	9/30/2016	3
	Updated CCL 10/3/16	CO	10/3/2016	3
	Traffic Study Proposal	Traffic Analysis & Design	10/7/2016	3
	Updated CCL 10/17/16	CO	10/17/2016	3
Change Order for Backlog	Bray/PSI	10/21/2016	3	



MANAGE YOUR LIFE!





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 :(



What can you do?

Perhaps your report card score is not so good and questions are already written. What can you do between now and the election to help your chances?

- Use good campaign strategies!



Engage the Community

Community Engagement Strategies that work:

- Have a year round PR campaign that promotes your district
- Create a diverse community-led campaign committee
- Design at least a six-month campaign

Engage the Community

MUSKEGO
SHARE THE VISION



NORWAY
DISTRICT OF CHOICE

Community Engagement Strategies that also work:

- Articulate a clear vision
- Provide data to the community that justifies the need
- Create a sense of urgency
- Use positive student data to promote the election
- Conduct a community survey
- Beware of the public perception about cost
- Get unanimous board support
- Avoid controversy
- Use a variety of media sources
- Focus on the “YES” voters

Engage the Community

At LEAST 6 Months

- Go it alone, or seek feedback?
- Solicit a Community Committee?
- Schedule Tours (Know Your Stuff!)
- Celebrate facility use and any efficiencies
- Seek Recommendations to bring to the board and have community lead
- Keep press in the loop
- Keep City in the loop
- Balance the Audience
- Invite Departments/Coaches to Sell the Need
- Facilitate Narrowing Exercises
- Survey Community on a variety of solutions, but be specific & TRUST the data!





Consider Reaching....

- Future Neighbors
- Retirement Communities
- Churches
- Lions Club
- Women's Club
- Chamber of Commerce
- Open Houses at ALL schools

Messaging....BE CAREFUL

- Get Ready To Get Picked On...only 50% generally s
- Have Committee Be A Major Sounding Board
- EVERYTHING will be scrutinized!
- Twitter/Facebook are great tools
- Brand the Campaign
- Listen and Learn Sessions
- Walk Thru's
- “Something for Everyone” Might not work



\$34 million Muskego-Norway School District referendum fails

Journal Times staff Nov 2, 2010 0



Muskego-Norway trying referendum again

WIND LAKE - The Muskego-Norway School Board on Nov. 8 will ask voters to approve a \$29.9 million referendum to consolidate and revamp the dist...

NORWAY - The \$34 million referendum to consolidate two elementary schools in the Muskego-Norway School District failed Tuesday.

The district held a referendum asking voters to finance an



You Failed...

- Be cautious of letting your district fall apart
- Keep sharing the good!
- Win Trust
- Reformulate your approach

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!

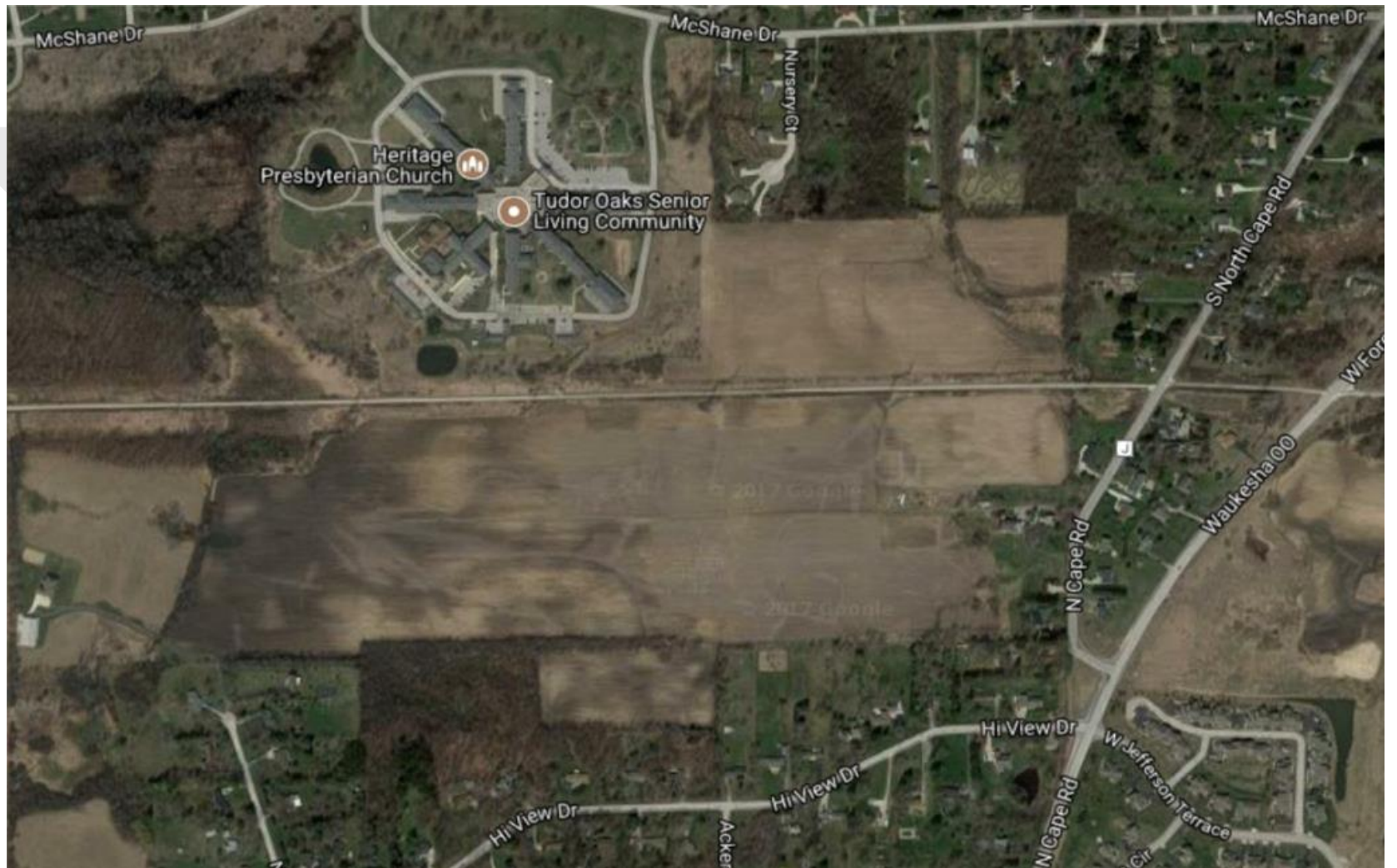
1 year

- You Might be in the hole day 1?
- The design team will start to hoan in on a solid plan
- Construction Team will balance that with budget
- Keep a good cost control log
- Architects can work directly with teaching staff (Take Notes)
- Involve Municipalities
- Don't release elaborate renderings...things change...and people judge



Wait...What about the Municipality?

- Do you have a good relationship with city government?
 - **Green Bay Example:** Most public schools are adjacent to city parks. In joint effort to ease the construction transition, the city is allowing the school district to build the new elementary school right next the existing building on city park property. When the new building is complete, the students will walk next door to the new building and the old building will be taken down, the site will be reappropriated as city park property. We entered into a land swap agreement to make this possible.



Construction



- Bidding packages
- Specification trouble!
- Involve Staff with updates & Tours
- Control Costs (Change Orders) Articulate finance thresholds for change orders
- Lunch with Contractors
- Weekly progress meetings
- Furniture Ordering & Playgrounds
- Board Updates
- Inform neighbors & Enforce Ordinances
- Have Architects continue to be a part of meetings and address RFI's
- Punchlists

Custodial Staffing/Scheduling



- Book Carts
- Team Cleaning
- Rental Trucks
- Speedpacks
- Keeping Track of Shared Equipment & Rentals

MNSD 2018 Summer Schedule

August

Summer Hours Start Time 6:30am	Duration of Days	Start Date	Deadline/End Date	Completed
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Wed	Thur	Fri	Sat	Sun	Mon	Tue	Wed	Thur	Fri	Mon	Tue	Wed	Thur	Fri	Sat	Sun	Mon	Tue	Wed	Thur	Fri	Mon	Tue	Wed	Thur	Fri	Mon	Tue	Wed	Thur	Fri
1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	13th	14th	15th	16th	17th	18th	19th	20th	21st	22nd	23rd	24th	27th	28th	29th	30th	31st					

District Info

Summer Institute Training	3 Days	Aug 20th	Aug 22nd	
All staff return to schools		Aug 23rd		
Moving Trucks		May 25th June 29th & Aug 6th - 31st		

																															Teachers Return	
																																Moving Trucks

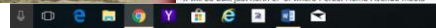
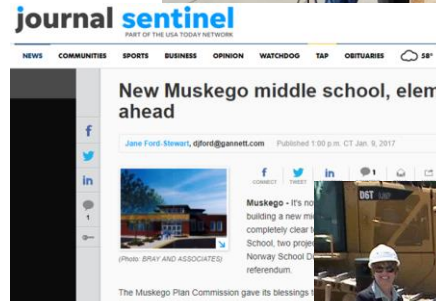
High School

Cleaning: Outside Windows/Entrances	5 Days	July 16th	July 20th	
Cleaning: PAC ??????	5 Days			
Cleaning Sal Gym for Graduation		May 7th	May 25th	
Graduation Setup		May 29th	June 1st	May 31st
Sports Camp		June 4th	June 8th	
Summer School		June 11th	July 20th	
Band Camp		July 16	July 27th	
Finishing Cleaning School				

																															Teachers Return	

Ribbon Cuttings

- School Closing Ceremony
- Ground Breaking
- Open House
- Press Releases
- Dedications
- Regular tours
- Involve Students





Wrap Up

- Staffing Plans
- Keep budget for the little things
- Self Performance of cleaning?
- Commissioning & Warranty
- Focus On Energy Incentives?
- Change Utility Accounts
- Logos & Signage
- Schedule 1 & 2 year walk with contractor