

History of Referendums

Presentation to the Board of Education

October 17, 2013

SCHOOL DISTRICT OF



FORT • ATKINSON

A look at the last 8 years ...

- Referendums we've had and needs they've addressed
- Role of the community
- Board decisions / actual questions
- Results
- Current need
- Next steps

October 18, 2005 - DISTRICT NEED

The District faced three major challenges:

- Needed Building Upgrades – HVAC systems at Barrie, Rockwell, Purdy and the Middle School
- A Structural Financial Deficit – An annual revenue shortfall for day-to-day operations
- Technology Needs – The State TEACH Grant used for technology ended in 2003.



October 18, 2005 - COMMUNITY

- No Citizen Taskforce - Authored by BOE and Administration
- Listening Sessions and Presentations by Administration
- Vote Yes for Kids Campaign (Citizens' Committee)



October 18, 2005 - QUESTION & RESULT

Question:

Exceed the Revenue Limit by \$2.1 Million on a Recurring Basis to:

- a. To Repair, Replace and Upgrade HVAC Systems in 4 Buildings
- b. To Purchase and Maintain Technology Equipment and Software
- c. For General Operating and Maintenance Expenses

Result:

“Yes” Votes: 1,305

“No” Votes: 2,097

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Post 2005 Referendum

Survey Results: Voters said...

- We're concerned about property taxes
- We want to support the current level of educational programming, but...
 - We want a sunset
 - We won't write a blank check
 - Give us choices
 - Work harder to cut spending
 - We want to be asked to spend a smaller amount of money more frequently if needed
 - Schedule a referendum to coincide with a regularly scheduled election
 - We expect School Board members to support it actively

SCHOOL DISTRICT OF



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April 4, 2006 Referendum

April 4, 2006 - DISTRICT NEED

The District faced the same three major challenges:

- Needed Building Upgrades – HVAC systems at Barrie, Rockwell, Purdy and the Middle School
- A Structural Financial Deficit – An annual revenue shortfall for day-to-day operations
- Technology Needs – The State TEACH Grant used for technology ended in 2003.

April 4, 2006 - ROLE of COMMUNITY

- Taskforce Established by BOE
- 18 Community Members
- Taskforce Charge:
 - Understand the fiscal condition of the District and forecast five years out
 - Develop long-term recommendations to address fiscal challenges
 - If a referendum is recommended, prepare a plan and timeline.
 - Taskforce guidelines from BOE:
 - Be supported by the Taskforce as a whole;
 - Indicate how each fiscal challenge would be addressed; and,
 - Include a list of advantages and disadvantages of the options
- “Friends Of Fort Schools” Citizen Group Formed

April 4, 2006 - Taskforce Recommendations

Option A:

- Through cuts and additional revenue
 - Reduce 2006-07 budget \$150,000 on a recurring basis (used to fund technology)
 - Reduce the 2007-08 budget an additional \$100,000 on a recurring basis
- In April 2006, ask voters for permission to exceed revenue limits on a non-recurring basis by \$1,063,000
 - Beginning with 2007-08 and ending 2011-2012, (5 years) to maintain educational programming.

April 4, 2006 - Taskforce Recommendations

Option B

- Make reductions and seek alternative revenue sources to balance budget
- Survey all school District residents regarding various budget reduction possibilities, identify cost, benefit, value relationships
- In October 2006, reconvene Taskforce to refine recommendation
- In April 2007, ask voters to approve exceeding revenue caps to maintain educational programming and technology (amount and timing to be determined by Taskforce and determined by School Board)

April 4, 2006 - Taskforce Recommendation

Regardless of Option Selected, District MUST:

- Reduce spending
- Work to increase enrollment
- Seek alternative funding
- Be proactive: Innovative ideas/partnerships
- Upgrade and maintain older buildings
- Technology – Operational expense (integrate into budget)

April 4, 2006 – BOARD DECISION

After consideration of Taskforce options, the Board of Education:

- Acknowledged and honored public feedback received through the survey in public reports, publications and through the media
- Used portions of the Taskforce recommendations and made modifications
- Made presentations with Taskforce members to civic organizations/community groups

April 4, 2006 - QUESTION & RESULT

Three Questions:

- Issue \$9,650,000 in bonds to pay for conventional technology repair, replace and update the heating and ventilations systems and to install air conditioning in Barrie, Purdy, Rockwell and the Middle School.
- Issue an additional \$1,040,000 in bonds to pay the additional cost of using geothermal to heat, ventilate and air condition the four buildings.
- Exceed its state-imposed revenue limits by an amount not to exceed \$694,000 each year for five years on a non-recurring basis to maintain educational programming.

Result:

Voters approved all three questions by a narrow margin:

- Question 1 (HVAC) won by 199 votes
- Question 2 (Geothermal) won by 83 votes
- Question 3 (Operational) won by 20 votes

SCHOOL DISTRICT OF



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April 5, 2011 Referendum

April 5, 2011 - DISTRICT NEED

With the sunset of the April, 2006 Referendum, the District faced a structural financial deficit

- An annual revenue shortfall for day-to-day operations
- \$694,000 reduction to the operational budget

April 5, 2011 - ROLE of COMMUNITY

- Taskforce Established by BOE
- 19 Community Members
- Taskforce Charge by BOE:
 - Develop a collective understanding of the District's current fiscal condition and its forecast for at least the next five years.
 - Develop the long-term fiscal recommendation(s) to address fiscal challenges for consideration by the Board and presentation to the community.
 - If the final recommendation(s) includes referendum, prepare a plan, including a timetable for when and how to implement that recommendation.
 - Indicate how the financial challenges would be addressed
 - Include a list of the option's advantages and disadvantages.

April 5, 2011 - ROLE of COMMUNITY

Taskforce Actions:

- Taskforce recommended conducting a meeting and follow up survey with District staff resulting in a list of 300 ideas for potential cost savings/revenue generation
- Reviewed results tabulated that were categorized and related costs determined with feasibility considerations
- Analyzed the entire operational budget

April 5, 2011 - Taskforce Recommendation

- Continue to exceed revenue limits by \$694,000
- Sunset after 5 years
- Reduce expenditures
- Raise revenue

April 5, 2011 – BOARD DECISION

After consideration of Taskforce options, the Board of Education:

- Used portions of the Taskforce recommendations and made modifications (changed sunset to 3 years)
- Made presentations to civic groups

April 5, 2011 - QUESTION & RESULT

Question:

The School District budget shall include an amount not to exceed \$694,000, which is the same level of support as the 2006 referendum, in excess of the revenue limits imposed by a section of the Wisconsin Statutes each year of a period of three years on a non-recurring basis, beginning with the 2011-12 school year and ending with the 2013-14 school year for the purpose of maintaining educational programs in the School District.

Result:

- Initially passed on election day by 10 votes
- After a requested recount, passed by 4 votes
- Recount challenged in court and upheld
- Total District cost for recount: \$32,854.22

In Summary ...

2006 – \$694,000 Above Revenue Limit for Five Years

2011 – \$694,000 Above Revenue Limit for Three Years

The District has not asked for an increase in funding for the past eight years.

SCHOOL DISTRICT OF



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April 1, 2014 Referendum

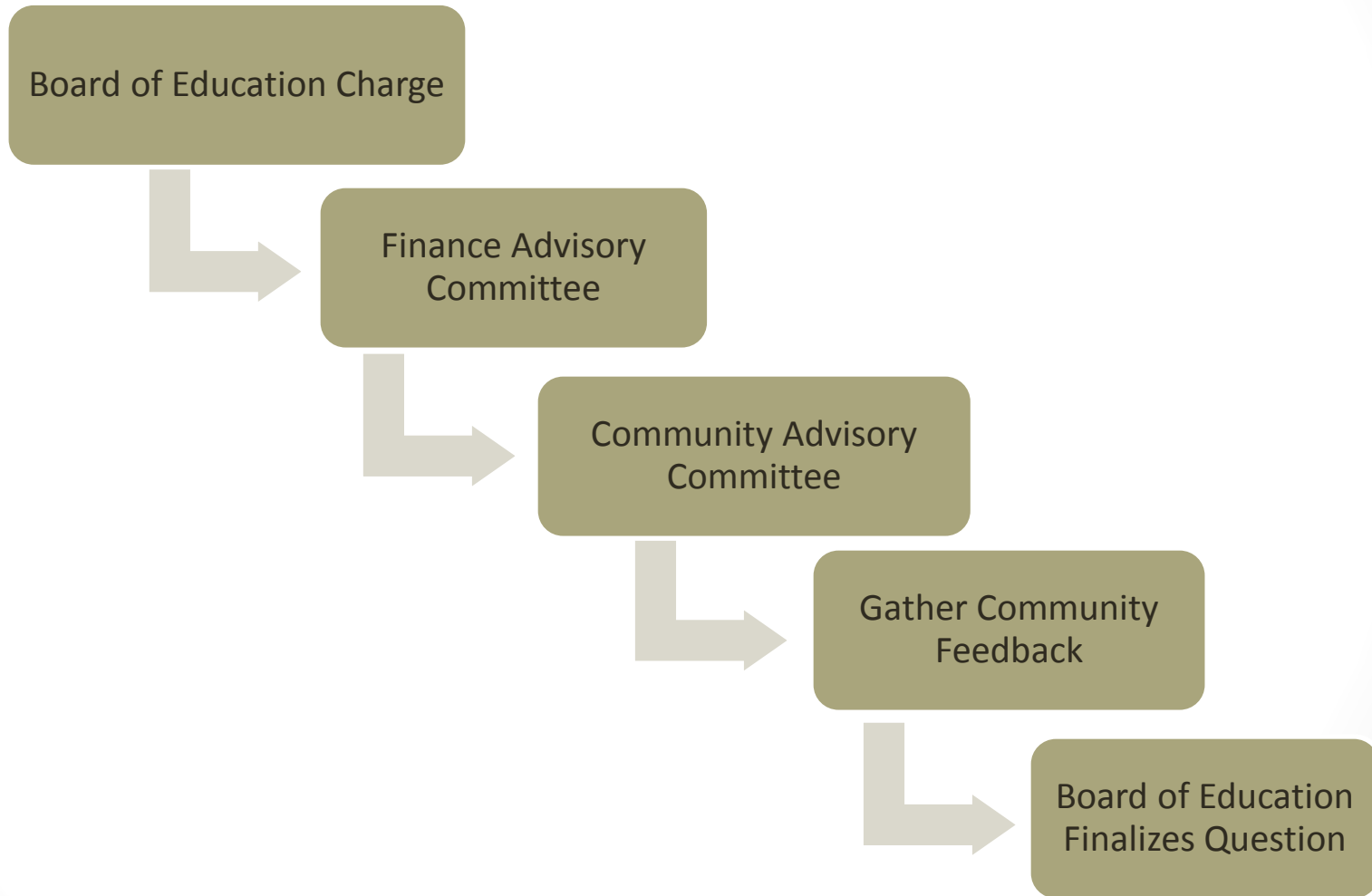
Our Current Need



- 2011 Referendum sunsets at the end of the 2013-14 school year (loss of \$694,000 in revenue)
- The revenue received from the State, within this biennium budget, will not allow us to maintain the current level of programming and services.
- We are committed to maintaining our current level of educational programming and services. Without a referendum to address the two previous bullets, this can not happen.

NEXT STEPS:

Big Picture of Process



Next Steps...

- **Two Citizens Taskforces:**
 - Finance Advisory Committee (Established)
 - CHARGE: Make recommendation(s) to the Community Advisory Committee regarding a referendum structure in the best fiscal interest for the School District of Fort Atkinson and the larger community.
 - Become familiar with the financial status of the District
 - Consider known potential District needs for a minimum of the next five years
 - Consider referendum options presented by Administration
 - Consider any additional referendum options developed by the Finance Advisory Committee
 - Finalize up to three (3) written referendum recommendation(s) to be forwarded to the Community Advisory Committee with rationale and preference ranking, including structure of question(s), years, amount(s), and recurring / non-recurring
 - Select member representation to become part of the Community Advisory Committee

Next Steps...



- **Two Citizens Taskforces:**

- **Community Advisory Committee - Open Invitation**

- **CHARGE:** Make recommendation(s) to the Board of Education regarding a referendum structure in the best overall interest for the School District of Fort Atkinson and the larger community.
 - Become familiar with the financial status of the District
 - Consider referendum options recommended by the Finance Advisory Committee
 - Consider any additional referendum options developed by the Community Advisory Committee
 - Finalize up to two (2) written referendum recommendation(s) to be forwarded to the Board of Education
 - Make recommendations to the Board of Education regarding communication to the community
 - Select member representation to present referendum recommendation(s) to the Board of Education

Next Steps ...



Referendum Timeline

Oct. / Nov.	Finance Advisory Committee and Community Advisory Committees Meet
12/19/13	Community Advisory Group recommendation received and considered by the BOE at Regular Meeting
TBD	Special Meeting for BOE to further discuss Advisory Group Recommendation (as needed)
12/20 to 1/15	Community Informational Video and Survey Monkey Open for Feedback
01/16/14	Last regular meeting date for Board to adopt revenue cap referendum resolution
01/21/14	Deadline for filing referendum question with County Clerk(s)
01/24/14	BOE / Administration Joint Meeting
01/26/14	Filing of referendum information with DPI (w/i 10 days after adoption of revenue cap resolution)
03/04/14	Publication date for Type A Notice
03/10/14	Distribution of ballots to Municipal Clerks by this date
03/31/14	Publication date for Type B and C Notices
04/01/14	Referendum date

2013-2018 Strategic Plan

- Collaboratively constructed with staff, administration, Board of Education, student and community feedback throughout the 2012-2013 school year
- Addresses three areas: Academic, Fiscal and Communication
- In each of these areas, we are called to:
 - Continuously improve our current programs and services ... assuring we are up-to-date and meeting the needs of our students, staff and community
 - Navigate and comply with new mandates and requirements such as implementation of the Common Core Standards, the Affordable Care Act, Educator Effectiveness, etc.
 - Provide services, in all three areas, that allow us to fulfill our mission and emerge as an exemplary school district and leader in providing educational excellence



Mission Statement

The School District of Fort Atkinson is committed to delivering the quality opportunities and services each student needs to achieve his or her academic and personal potential