# TOP 3 Referendum Mistakes

## from the architect's perspective

*by Curt Wiebelhaus*

**IN THIS ISSUE,** we examine the **top 3 referendum mistakes** from the architect's perspective:

**1 - Not developing** the best referendum project for the students and the community.

**2 - Failing** to follow the results of the survey.

**3 - Failing** to engage the entire district.

For the school boards, superintendents, business directors and facility directors who oversee them, capital referendums can be once-in-a-career events. Given the critical opportunity presented by a capital referendum, management at the highest level can be as difficult as it is essential.

School districts typically partner with professional firms to assist with the details of planning and managing a referendum. Wisconsin is fortunate to have excellent architecture, construction management and owner's representative firms that specialize in capital referendums.

Building Solutions, an owner's representative firm in Wisconsin, is often approached by school districts seeking a construction/referendum expert to efficiently and effectively navigate the capital referendum process. The staff at Building Solutions believes that any district considering a referendum learns and understands what NOT to do before the first step is taken toward a referendum.

This article is the first in a series of three providing the perspectives of three key professionals intimately involved in the proactive planning it takes to lead a successful referendum. This article includes the perspective of two leading Wisconsin K-12 architects. The next article will include the perspective of a construction manager, and the third the perspective of an owner's representative.

Bray Architects and Plunkett Raysich Architects, two prominent

Wisconsin K-12 architectural firms, provided insight and input for this article. Combined, these two firms have been involved in 128 referendum campaigns in the last 10 years. Their experience and perspective can help districts avoid repeating other districts' mistakes.

### MISTAKE #1: Not developing the best referendum project for the students and the community.

A school district has many different viewpoints and opinions to consider when pursuing a referendum. A well-defined process is critical to ensuring the final result represents the true needs of the school district to best serve the students and the community. The following steps and processes will help ensure the district will come to the best solution.

**STEP 1 Build a team and develop a strategy.** Most school districts start their referendum process because they have facility needs that are difficult to address through typical operational funding sources. They need help determining the full magnitude of their needs and whether the community will support a referendum. A minimal investment at this stage is appropriate to get professional guidance to help the district create a strategy based on its specific situation. It is not appropriate to commit the district to partners at this stage without establishing pre-referendum milestones that will limit the district's risk and ensure a competitive process in selecting their partners.

Owner's representatives, architects and construction managers are important partners to support the district's pre-referendum planning efforts. The owner's representative will be the key to dividing the potential project into the pre-referendum milestones. While establishing an overall strategy for the district, one of the initial steps is issuing a request for proposal to select an architect and/or construction manager for pre-referendum services.

The primary role of the owner's representative is to use their expertise to protect the overall interest of the district using proven processes. A well-written RFP is critical. The owner's representative will create an RFP and help the district select the best architecture and construction management firms for the project. If structured correctly, the district's cost and risk of hiring an architect and construction manager before passing a referendum are low. Hiring these partners early provides the district an opportunity to partner with experts who will help guide the process. At the same time, it gives the professional firms an incentive to work hard to find the best solution that will result in a successful referendum vote so they may earn the opportunity to design and construct the project. It is very important that the owner's representative establishes a well-written strategic RFP and contract to ensure all pre-and post-referendum costs are based on competitive, evaluated fees and rates.

When districts hire services or purchase products, it is common to use a template RFP borrowed from another district. While this may work well in other purchasing situations that districts encounter, it does not work well for construction management and architect services. The RFP is the foundation of the complex contract and the project. An RFP should only be written by someone who has a complete understanding of standard industry contracts by the American Institute of Architects.

**Owner's representatives, architects and construction managers** are important partners to support the district's pre-referendum planning efforts.

**STEP 2 Assess the district's needs.** If a current facility assessment does not already exist, a detailed assessment should be performed. It is necessary to know the strengths and deficiencies of existing facilities before options are developed. Deficiencies may be related to deferred maintenance or inadequate spaces that don't support the district's current or future educational goals.

An educational assessment is done in parallel to the facilities assessment. Key questions will be answered and documented during the educational assessment, including:

- What is the district's vision related to delivering the best education?
- What type of educational space is needed to meet the vision?
- How are different types of learning environments best situated to support the vision?

Some common ways to collect different perspectives related to district needs include:

- The architect and engineers perform a technical analysis of every space.
- The building and grounds department reports areas of concerns and deficiencies.
- The district staff responds to a questionnaire, survey and/or a visioning meeting to provide feedback related to the facility deficiencies, concerns and/or opportunities.
- Educational opportunities, space and programming are compared to other model districts or benchmark standards.

**STEP 3 Explore options and solutions.** Engage key administrators and staff in the district to elaborate on concerns indicated by the broader staff feedback in step two. Brainstorm and develop potential solutions with a side-by-side comparison to show how each solution addresses the key needs of the district. This comparison document helps the core team track all the different potential solutions and also helps communicate to the community the level of detail and effort that was performed by the district in an attempt to find the best solution.

**STEP 4 Engage the community.** It is important to provide the community several opportunities to be a part of the solution for two important reasons.

First, the broader community represents different perspectives. Staff members are often viewed as experts in developing the most effective way to educate the students. However, questions and comments from the community often allow the core team to make adjustments to improve the potential solutions by considering alternative viewpoints.

Secondly, the broader community does not know the intricate details related to education and facilities. Community engagement provides the district an opportunity to explain this detailed process and the many different factors included in the planning effort. When people understand the process, along with understanding the "why," they are more likely to support the solution.

***Notes from a staff visioning session*** *can help collect and distill different perspectives relating to district needs.*

***Referendum Communication Process:*** *Typical phases of a communication plan leading up to a referendum*

**STEP 5 Test or validate the narrowed down solution(s).** Using a professional surveying firm, develop a survey for the broader community. A community survey provides an excellent opportunity for the district to understand the likely support for a referendum question. Some of the top goals related to performing a community survey include:

- Determine the tax tolerance of the community. What is the maximum tax increase that the community would likely support, assuming they agree with the solutions?
- Determine what components of the referendum are best supported. Most referendums have several different components (campus improvement options, classroom improvements, site improvements, athletic improvements, fine arts area improvements, etc.). The survey results will indicate which of these components are of a higher priority to the community. This will allow the core team to make educated decisions when finalizing the solution.
- Educate the community. A survey sent to every household in the district will help inform members of the community. Someone who is informed is more likely to support the solution.

**STEP 6 Refine and formalize a referendum question.** Using data collected from the survey, develop a referendum question. The final referendum question should reflect the outcome of all the efforts in the steps above. An administrator or school board who feels they know what the community needs and ignores the recommended process has a greater chance of experiencing a failed referendum. Trust the process and listen to the results.

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**STEP 7 Inform the community.** The final step before the referendum vote is to educate and further inform the community. If the process is done effectively, as outlined above, effectively, they include:

- Communicating the detailed process that led to the solution.
- Communicating the project and how it addresses the needs to meet the vision of the district.
- Describing to voters what to expect on the ballot.

Create and follow a detailed communication plan. It is a mistake to think that the broader community will respond to an open invitation and fill up the high school gym to learn about the referendum. The district needs to be intentional to reach the community. Informing the community can have many different forms, including in-person presentations, virtual presentations, printed mailers, yard signs, information boards, websites, take-home school handouts, weekly social media posts, open houses, and radio, newspaper and TV coverage.

## MISTAKE #2: Failing to follow the results of the survey

The community survey indicated in step five is a highly effective strategy tool that school districts use before going to referendum because of the valuable information it provides. Before a survey is developed, the school board and the core planning team should agree that the survey results will guide the project. An administrator or board member's opinion or desires should not supersede the results of the process.

Matt Wolfert of Bray Architects has been a partner on more than 80 referendum questions, more than 50 of which used a survey. "It is critical that districts only use the community survey process if they will listen to the result," said Wolfert. "We have only had a few districts that have not been successful with their referendum proposals and all but one of the failed proposals were the result of districts not following the statistically valid findings of their survey."

The survey is one of the best ways to understand how the community will vote without actually having the referendum. This allows adjustments to be made to help ensure a successful referendum. According to Bill Foster, president of School Perceptions, a popular school referendum survey firm, approximately 70% of voters in an average community do not have a child in school and are not a staff member of the district. Because this group of people represents the majority of the community, they will decide the outcome of the referendum. If a school district ignores the feedback and desires of this group of people, there won't be as much support for a referendum.

**It takes intentionality and effort** by the district team to engage and get feedback from the entire community.

## MISTAKE #3: Failing to engage the entire district

The architect, construction manager and owner's representative are key team members guiding the pre-referendum process. As valuable as these firms are, they will provide little help in knowing the community. The district core team needs to ensure that all community perspectives are engaged to maximize the odds for a positive outcome, explains Nick Kent, partner and educational planner for Plunkett Raysich Architects.

"Districts often concentrate their communications efforts where they can get the most impact," Kent says. "In geographically large districts, this may mean hosting community conversations at the school 'in town' and potentially neglecting outlying communities and constituents. Make sure to meet community members where they are, do not expect them to come to you."

A common mistake is to primarily meet with groups that are directly connected with the school district, or to just extend an open invitation to the broader community. This is not enough. It takes intentionality and effort by the dis-

trict team to engage and get feedback from the entire community. The rest of the project team will support these efforts. However, it is often the district superintendent and business manager/director who will be presenting information in meeting after meeting with the many stakeholders in the community. Communicating with a variety of groups, such as the local chamber of commerce, local real estate association, athletic clubs, local municipalities, church groups, civic groups and retirement-age type groups, is part of an effective referendum information effort.

It is also important to remember that no capital referendum passes unanimously. There will be dissenters within the community, and it is important to respect and offer to engage with them. They may not agree with the question, but ensuring they have the opportunity to hear the facts and make an informed choice at the ballot box can go a long way toward building greater community support.

Significant value is added to a construction project when a school district either fully understands the intricate details of managing a referendum or supplements its existing resources with the expertise of an owner's representative. Building Solutions has a targeted focus on preventing and eliminating school districts' mistakes. By minimizing mistakes and errors, more of the resources available to school districts can be used to improve the district. Improving students, staff and facilities are key components to a highly effective community.

Avoiding these common referendum mistakes will certainly improve Wisconsin school districts' chances of having more enjoyable and successful referendum experiences. If your district is considering a referendum, print this article and post it as a reminder of how to avoid these mistakes. ■

***Look for Part 2 and Part 3*** *in upcoming issues of Wisconsin School News. Curt Wiebelhaus is the founder and owner's representative at Building Solutions.*

## UP NEXT...

SECOND IN A THREE-PART SERIES — REFERENDUM TOP3 MISTAKES — CONSTRUCTION MANAGER

**PART 2: June-July issue**

**Construction Manager's perspective:**

**1 - Not creating** a clear "road map" or plan.

**2 - Allowing too much** "scope creep" in the project.

**3 - Not managing** the project's soft costs.

THIRD IN A THREE-PART SERIES — REFERENDUM TOP3 MISTAKES — OWNER'S REPRESENTATIVE

**PART 3: August issue**

**Owner's Representative perspective:**

**1 - Inadequate request** for proposal when hiring the architect and construction manager.

**2 - Ignoring or not knowing** important roles of the school district.

**3 - Failing to audit** project costs.


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