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Millions of dollars, thousands of conversations, hundreds of meetings, dozens of yard signs, and at least one viral video.

Three school districts in Illinois shared their stories about calling for a referendum for their district needs. Together, they prove that you get what you work for, not what you wish for. But even then, there's no guarantee. Despite some differences in needs, approaches, and core issues, they had key points in common:

- All began by engaging their community and finding active supporters;

- All dug deep tell their story, providing facts and communicating with transparency;

- All studied both what they needed, and what they could ask for; and

- All succeeded.

“History taught us to not try to ‘fly a referendum under the radar’,” said Michelle Bernier, president of the Morton CUSD 709 Board of Education. Morton passed a \$10.5 million bond referendum in the general primary in March 2016, to “build and equip additions to and alter, repair, and equip” its four elementary schools, a junior high, and its high school.

Cutting programs and increasing class sizes were expected without a referendum passage in Triad CUSD 2 in Troy, Ill. “We wanted to make sure the community was aware of what we had done — the cuts that we had made to be in the situation we were in,” said Jason Henderson, assistant superintendent at Triad. “We asked ‘what do you want us to do: keep cutting or continue the level of service and education we were providing?’”

Triad asked its community to approve a tax referendum, increasing property taxes to 2.34 percent from 1.84 percent, in the April 2015 consolidated election.

Also in the 2015 consolidated election, Aurora West USD 129 passed an \$84.2 million bond referendum to replace a 128-year-old elementary school building, and improve other facilities, including heating and cooling system installations, and school security improvements.

“We needed to work through the fact that we needed to learn our community and what it wanted,” said Jeffrey Craig, superintendent of the Kane County district. “Some questioned if we should go for a referendum three months after I started. We waited. I’m glad we did. We needed to first meet with our community and dig deep into the details of our facilities.”

Groundwork

As these districts prepared for referendum work, each story started with state funding, or lack thereof. With the foundation level unchanged since 2010 and the state prorating its payments from 2012 through 2016, as well as missing categorical payments during and since that interim, there wasn’t money to maintain facilities, replace outdated infrastructure, carry out operations, and educate students to levels the respective communities expected.

But a referendum is never an easy ask. Each of the districts acknowledged it was not quick, nor easy, to own the story, do the work, overcome the opposition, and have a successful outcome.

“In this day and age, when there is a critical public eye on taxes and spending, when there can be distrust of governmental bodies in general, there has to be a significant amount of groundwork laid in communicating with your constituents,” Morton superintendent Lindsey Hall said. “What we learned — what I learned, what the board learned — was that it’s not a quick process.”

In fact, Morton CUSD 709 saw a referendum fail in 2011. Hall became superintendent in 2012 and worked with the board of education to frame what would become the 2016 referendum question. According to Hall, the 2011 failure “set a course of action and of excellent decision-making by the board. They regrouped and determined to do community engagement. The feedback from the failure was that the communication wasn’t what it needed to be, that the story wasn’t told and there were a lot of distracting side stories,” she said.

In 2012, Morton invested in community engagement that guided its goal-setting and strategic planning. The district followed and intertwined that with a facilities advisory committee that met in 2013 and into 2014 to work through growing enrollment and

aging buildings. That committee's recommendation of a new high school was "a huge, expensive undertaking."

However, a new school board elected in 2015 changed the tenor of the conversation.

"The discussion changed to 'what are our urgent needs right now?' and 'what do we need to address our most critical needs?'" Hall said. "In mid-2015, we narrowed the scope of our urgencies, and came up with the financing and what exactly it was we needed to ask out voters to approve."

In 2013, Triad's fund balances had been cut and the district was spending into its working cash.

"We raised class size," said Henderson. "We cut every place we could, and came to a point where we needed either to see the state do a dramatic turnaround, or we needed to find more revenue, or we would do drastic, district-changing cuts — really big cuts that would alter the landscape of our district."

Triad engaged its community, first making sure it was aware of what the district had done to fix the situation, and also to ask the community for its input on the next steps: Keep cutting? Cut everything except varsity-level sports? Or continue the level of education it was providing?

"What came out of those meetings was that people didn't want to go the cut route," Henderson continued. "When the community told us that, we heard that we needed to go forward with generating revenue."

Aurora West USD 129 worked through a similar process. Prior to Craig's arrival as superintendent in 2014, a referendum question was floated and the district conducted a facilities audit considering the need to replace or upgrade aging buildings.

"We needed to get an understanding of what we had and what condition it was in," said Angela Smith, assistant superintendent of operations. "We also looked at what would need to be repaired, and what likely expenditures we would have in the coming years that would strain our operating budget if we didn't figure out a way to attend to them."

"The facilities audit was needed," Craig agreed, "not just to get a bird's-eye, superficial look at what we needed, but to dig deep into the details: the mechanicals, our roofs and doors. We had to understand what our parameters were, and to understand our debt capacity, before we set out saying 'this is what we'd like to accomplish.' We had to do our research."

The facilities audit covered 18 buildings, including one elementary school, parts of which date to the 1800s. The audit included “over a million square feet of roof, and everything needed for special education, technology, heating, cooling, and instructional environment.” Concurrently, Craig began his superintendency with a listening tour.

“You can’t go out there and ask for what we did without establishing a relationship first,” Craig said. “We did the listening tour, and that bore a lot of fruit for us. We introduced our new team and it was important for us to recognize and understand the community.

Central to the next level of conversation in West Aurora was prioritizing the needs of the district and its community.

“The new conversations were, ‘here’s what we heard from you,’ Smith said. “And here’s how we are going to attend to those specific needs. Building by building, we could tell that story.”

Show your work

Each of the three districts noted that it was critical to show to the community that the effort wasn’t being undertaken lightly. Every effort was made to demonstrate need.

“We continued to push out factual information, stayed positive, and made sure the community saw the need and knew the cost impact to them personally,” said Bernier, Morton’s school board president.

Triad CUSD 2 compared its revenue rates to that of surrounding districts, demonstrating that it was spending less. It showed it had already made considerable cuts, and that additional cuts would severely impact student learning. In doing so, Triad formed a budget reduction committee which included stakeholders from all of the district’s interests, to “make a path” to \$1 million in cuts, to show what the district would look like if the district did not gain additional revenue. The underlying theme was sharing the pain, and the purpose was for the stakeholder group to present its determinations, and for the board to act. The Triad board of education approved the recommendations and made the cuts – pending the outcome of the referendum vote.

Triad officials learned many things from the process, including how to help stakeholders understand the reality of the district’s financial situation, and helping the district see where it was perceived to be overspending.

“This was a big deal to me, because people could view what we were doing as scare tactics or threats,” said Leigh Lewis, superintendent of Triad CUSD 2. “But this was going to be the case, and it was going to hit everything — transportation, extracurriculars, class size — we had strategies for everything. Everything the board took action on, we were committed to doing.”

Overcoming the perception that individual programs could “fundraise out of it” was a crucial task.

“We made it clear,” she said. “If we were going to fundraise, it would be for academic, structural priorities. Don’t spend your time deciding what you will try to save if the referendum doesn’t pass. We’re not deciding how to save programs individually. Pass the referendum. Our board was united — if it doesn’t pass, we would lose these programs.”

Morton, similarly, sought realistic input and had a plan in the works if the referendum failed. A new school board looked at the background and decided a new high school was too big a project to take on, but worked towards a shorter-term solution to its facilities needs.

“We had a Plan B if it didn’t pass,” Hall said. “You’ve got to be ready to follow through. We discussed portable classrooms, on which my board was completely split. We looked at different scheduling options and at limiting involvement in some classes. None of this was palatable.”

Legwork

State law limits what school board members and school personnel can do to support a referendum (see related story, page 23). Each of the three districts used their preparatory community engagement efforts to identify supporters to springboard a community-led referendum campaign.

West Aurora Volunteers for Education (WAVE) created a Facebook page, which included a detailed flyer about the referendum and a video.

“Developing a volunteer team was really important,” Craig said. “They generated a lot of conversation in our community. They created a video, they found pockets in our community to have conversations. They were creative in communicating the message, and to relate it back to individuals.”

The music video, which was filmed at the antiquated Hill Elementary School, went viral. It includes lyrics such as “cost and complications through the roof, even literally” and “taxes won’t be raised to have great schools.” The video was targeted to the elementary

school community, which might not have been the usual 'frequent flyers' to the polls, according to Craig. "It brought them out, and by supporting that, they supported the whole referendum."

Triad's community involvement started with its community engagement work, and expanded from there in January 2015.

"We had the beginnings of the group," Henderson said. "And we looked for other people, school supporters, parents with children in the district and especially in activities, because one of the keys to our success was getting the story out — not just our financial story, but the great things the district was doing."

Triad's campaign included a Yes 2 Triad group, a social media blitz, "highlighting everything good" which reached potential voters who might not have a current stake in the district. The group produced infographics that presented financial details with clarity. The group went door-to-door among likely voters, armed with a script enforcing the supporters' message.

Morton benefited from pro-referendum support as well, including a group known as Morton Schools Matter, and Superintendent Hall considered it the key to the effort's success.

"We had an organized effort of a strong group of individuals," Hall said. "We had people who were willing to give up their time and offer their specific talents and strengths."

The districts took a different track when dealing with opponents. Triad didn't seek to engage with no-voters with their minds made up.

"I looked through our history," Lewis said. "And I saw that on previous tries, the district spent a lot effort to change peoples' minds. That approach didn't work, and we had to move away from that."

"We thought responding gave the no-votes a louder voice, added Henderson. " We decided not responding was a better strategy. That's not to say we didn't respond to reasonable questions. We had facts to correct misinformation, and we could reach out to those people with someone they knew, their neighbors and friends."

Aurora West didn't face organized opposition, but found that supporters of the referendum — both from within and outside of the organization — would correct misinformation they found on social media.

Morton faced stiff opposition.

“A very vocal anti-referendum group published incorrect information regarding the referendum, continuing to claim the district’s information was not accurate,” Bernier said. “These same people hijacked the community engagement process in certain cases, which made some people stop attending. We responded by staying positive. We continued to push factual information and made sure the community saw the need and knew the cost impact to them personally.”

Hall reported that the pro-referendum volunteers dealt with criticism unemotionally, and responded with facts. Some criticism, she said, was that the Morton referendum didn’t ask for enough.

“An interesting angle was that some were disappointed that we were asking for so little,” Hall, who is leaving Morton this year for another superintendent position, said. “If we were doing all this work, why didn’t we ask for a new high school? We made sure our taxpayers understood that what they were voting for was a short-term solution, and that at the time it was the right decision for us to make. Understandably, there are very few communities who can look a \$60 million bond issue in the face and be all for it. There are those in the community who will expect the next team to make a long-term plan.”

From the district’s perspective, each agreed that transparency is vital.

“Being completely upfront with the cost of the referendum was key,” said Morton school board president Bernier. “When people realized the impact to them personally, I believe many had that Ah-ha moment of, ‘this is financially doable for me.’”

West Aurora’s Craig noted that, from the outset, efforts to maintain the district’s relationship with the community is invaluable.

“There’s a credibility factor there,” he said. “We built the relationships to have people talking. The responsibility on our part was to have the voters’ confidence that we would hold true to our promises, both to not increase the tax bill and to fulfill the list of what we said we were going to accomplish.”

Tony Martinez is director of community affairs for Aurora West SD 129. “We ask a lot of our community. The first time you’re not straight with them, it makes it harder down the road to ask for support. Keep it real, be genuine and honest. Don’t overpromise. Make sure you have a statement of what will get done, be mindful of it, and don’t deviate,” he said.

Homework

Representatives from the three districts had similar advice for Illinois school districts anticipating a referendum: Be transparent, be prepared, and be able to tell your story.

“Be able to justify the needs as vital to the district and the future of the community,” said Morton’s Bernier. “Know the costs and be able to break them down to an understandable format. Be sure your financial assumptions are realistic and have an end point. Be able to answer the questions that will arise.”

“Know your numbers,” said West Aurora’s Smith. “You can’t be defensive about them, you have to be open and honest about them. Don’t commit to anything that won’t happen. If you have to, under-promise and over-deliver.”

“The number-one thing is being able to explain what you’ve done,” said Henderson of Triad. “People need to see you’ve done everything reasonable before you ask for more. Be one hundred percent transparent with everything: finances, budgets, expenditures. You have to show people what it’s going to look like, and be able to answer every question. Be prepared to tell the voters it’s their choice.”

Voters can prove that a hard-working effort is no guarantee and a well-executed campaign may still not result in successful passage of a referendum. School districts proposing referendums in Illinois saw equal parts success and failure. As success stories show, a failure might be the first step in the next success.

Resources

Aurora West SD 129’s viral video and referendum infographics can be viewed at <https://www.facebook.com/WAVE1292015/>.

Yes 2 Triad is at <http://triadhighschoolart.wixsite.com/yes2triad>

The Facebook page for Morton Schools Matter is at <https://www.facebook.com/MortonSchoolsMatter/>.

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