

BREAKING THE MOLD: Communicating Value, Not Cost in Building Programs

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Introductions



Rick Dewar, AIA (Moderator)

National PK-12 Education Practice Leader
Wight & Company



Mark Staehlin

Controller
Community High School District 99



Jill Browning, APR

Director of Communications
Community High School District 99



Brad Paulsen, AIA

Senior Vice President, PK-12 Education Practice
Wight & Company



Communications strands need to be in place to secure a successful major capital program

☐ Architect & Const. Manager

- Facility planning concepts
- Cost estimates, budget, sequence

☐ Financial Advisor

- Develop bond issuance plan
- Calculate taxpayer impact

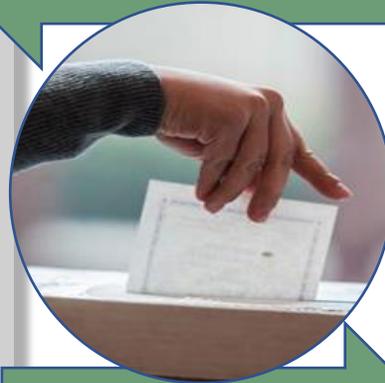
☐ Polling/Referendum Advisor

- Determine limits/hot buttons
- Messaging, benefits, etc.

☐ Community Advocacy

- Message development/delivery

Pre-REFERENDUM



Post-REFERENDUM

☐ Architect & Const. Manager

- Refine budget/priorities
- Bid packages/phasing strategy
- Risk assessment/market conditions

☐ Employee Groups

- Dig into details to maximize budget
- Assure staff “buy-in” on solutions

☐ Community/Taxpayers Link

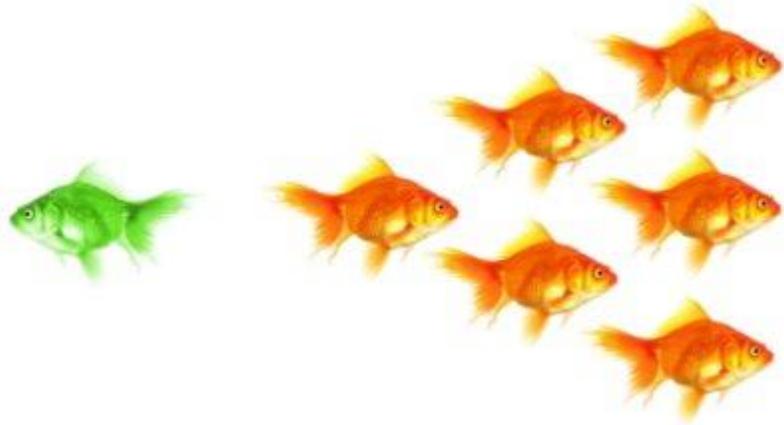
- Message development/delivery
- Monthly BOE meeting status
- Online updates



a timely topic as many plan for future referenda and building programs



what started as an idea to
change perspective on
building programs...



~~Saving Cost~~
Adding Value

what started as an idea to
change perspective on
building programs... **evolved into a story about**

bold decisions

learning from the past

keeping promises

delivering more

Changing mindset

risk management

thinking differently

project delivery

teamwork

building taxpayer trust



what started as an idea to
change perspective on
building programs... evolved into a story about

COMMUNICATIONS

The story of



Spring 2018 Building Referendum

- ✓ Budget guaranteed in 6 months
- ✓ Bond strategy saved \$37 M
- ✓ Completed 1 year early
- ✓ Absorbed \$19.6 M of MFP scope
- ✓ Basis for long-term community trust



STRONGER TOGETHER. SMARTER TOGETHER.

Raise your hand if you would like to...



achieve more of your facility master plan

deliver more value for your students

choose where to spend contingency funds



Raise your hand if you would like to...

eliminate finger pointing

focus on your day job

build more community trust



and not see this guy...





Downers Grove South HS
Original 1964

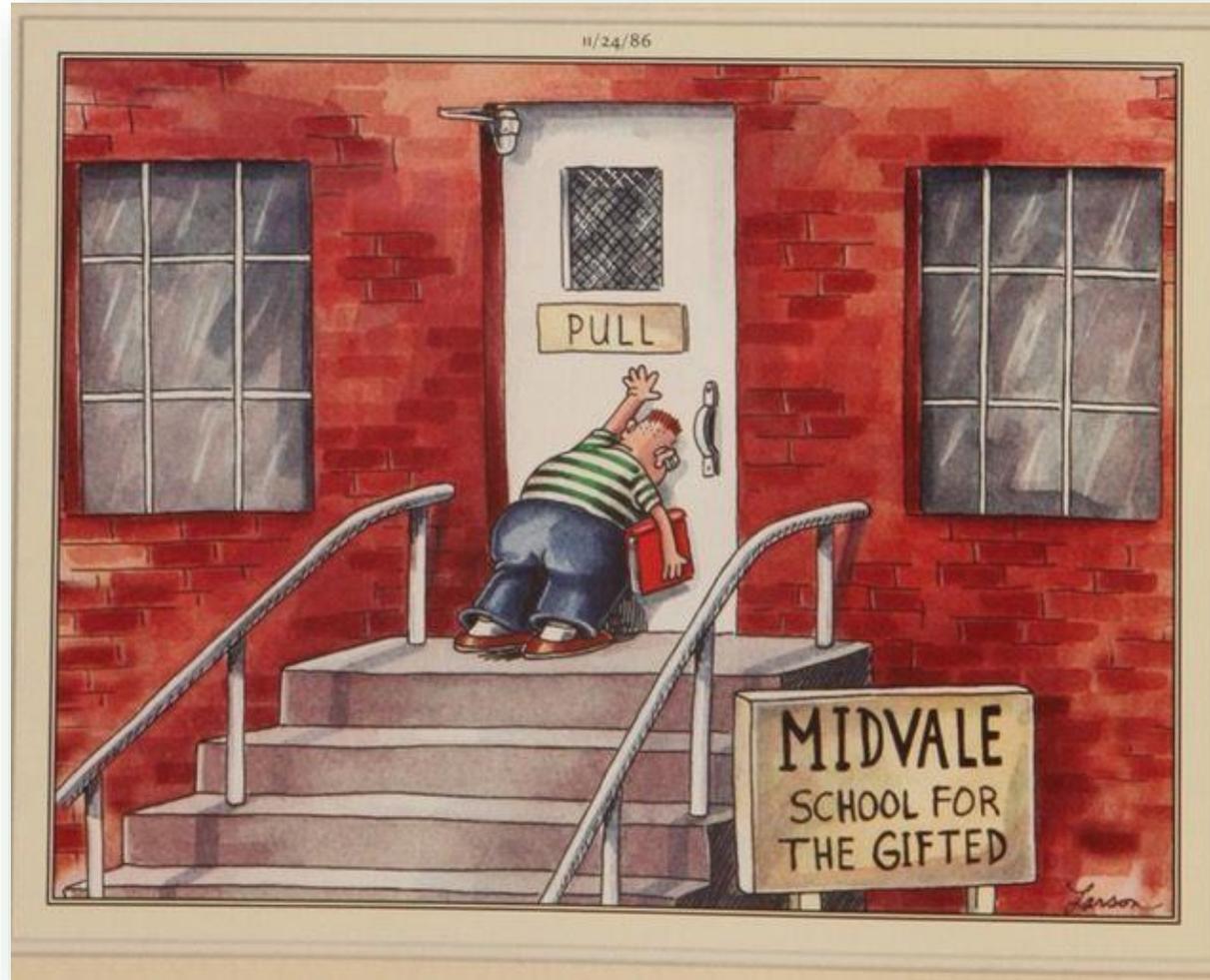
5,000
students
80,500
voters



Downers Grove North HS
Original 1928



Getting to Election Day



Assembling Team

Pre-referendum
Consulting



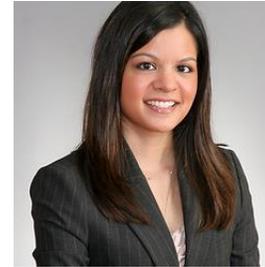
**Paul
Hanley**

Bond
Underwriter



**Elizabeth
Hennessy**

Bond
Counsel



**Anjali
Vij**

Master Facility
Planning



**Wight &
Company**



Developing options: Citizen's Task Force



- Evaluate Options
- Input on Priorities & Impacts
- Recommend What to Share & Test

Research what to place on the ballot

- Voter analytics
- Mail survey
- Online survey
- Phone poll

\$ 81M vs. \$ 136M

Table 1-1
Summary of Key Data
BANNER 1

COMMUNITY HS SCHOOL DISTRICT 99 - BALLOT MEASURE FEASIBILITY STUDY / 17015 / NOVEMBER 4-7, 2017

PAGE 1

	PARTY IDENTIFICATION				TOWNSHIP		GENDER		AGE					GENDER/AGE		CHILDREN IN HH				
	TOTAL	REP	DEM	IND	DEM	REP	MEN	WOMEN	18-44	45-54	55-64	65+	MEN 18-54	WOMEN 18-54	NO	TOTAL YES	NO	K-6	MIDDLE /HS	
BASE/TOTAL SAMPLE	300	86	106	100	100	186	144	156	75	57	68	100	72	60	96	213	87	27	33	46
SAMPLE A INITIAL BALLOT MEASURE (D/S)	51	3	13	37	39	11	25	26	24	7	10	15	11	16	10	25	24	8	9	11
TOTAL YES	92	22	28	41	60	32	48	44	29	13	22	29	23	25	62	29	12	12	13	
TOTAL NO	41	18	15	4	21	20	23	18	5	6	12	18	8	5	14	6	1	1	2	
LEAN/UNDECIDED	17	4	9	2	11	6	8	9	3	3	3	7	2	12	10	20	26	9	10	
SAMPLE A INFORMED BALLOT MEASURE (D/S)	48	6	2	42	36	12	20	28	23	6	22	31	22	26	21	55	62	32	13	
TOTAL YES	94	23	24	45	60	34	48	46	30	13	20	31	22	26	62	32	13	13	15	
TOTAL NO	10	3	7	10	2	2	3	4	1	1	1	6	3	3	7	11	5	10	8	
LEAN/UNDECIDED	52	3	15	39	26	47	28	40	7	6	12	16	10	16	3	19	25	28	10	
SAMPLE B INITIAL BALLOT MEASURE (D/S)	95	20	29	43	57	38	40	55	32	20	55	17	26	14	26	29	57	39	10	
TOTAL YES	43	17	21	5	31	12	21	22	4	13	11	14	10	11	21	7	14	32	11	
TOTAL NO	11	7	4	3	4	6	10	5	4	7	1	7	5	2	6	10	1	1	1	
LEAN/UNDECIDED	58	7	12	37	31	27	23	36	27	11	9	11	9	11	17	16	6	7	2	
SAMPLE B INFORMED BALLOT MEASURE (D/S)	99	23	31	43	58	41	43	57	32	22	63	22	18	27	16	27	29	59	41	
TOTAL YES	41	16	19	6	27	14	20	21	4	12	9	16	10	10	18	6	15	33	15	
TOTAL NO	10	4	4	2	8	2	2	7	4	1	4	3	1	1	4	1	1	4	2	
LEAN/UNDECIDED	66	16	19	12	29	14	20	25	3	13	3	13	6	6	11	11	6	7	4	

PUBLIC OPINION STRATEGIES

Spring 2018 Referendum

Shall the Board of Education of Community High School District Number 99, DuPage County, Illinois, **improve the sites of, build and equip additions to and alter, repair and equip existing buildings, build and equip outdoor facilities and enclosed structures**, said projects including but not limited to constructing security improvements, increasing accessibility under the Americans with Disabilities Act, **enclosing all or a portion of the outdoor courtyards to increase indoor learning spaces**, renovating classrooms, science labs, vocational labs and learning spaces and **completing the installation of air conditioning in all classrooms**, and **issue bonds of said School District to the amount of \$136,600,000 for the purpose of paying the costs thereof?**

Basic Across Both Schools

- Safety & Security
- Accessibility
- Air Conditioning
- Modern Learning Spaces
- Learning Commons
- Parity Across Campuses

South High School

- Outdoor PE space
- New Auditorium
- Establish Architectural Identity

North High School

- New Gym
- Expanded Cafeteria
- Respect & Celebrate History



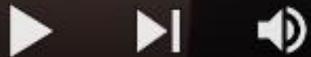
Video “presentation”

Funding: Three Directions to Consider

1. Complete the **entire scope** of the project and reinvest in our schools by issuing \$136.6M in bonds (\$65 increase per year for a \$300K home)

Bond issuance amounts include any portions needed for costs of issuance and include a reasonable cushion of between 0.5% and 1.0% for interest rate increases assuming we will use a staggered - multiple year (2019-2021) issuance.

Play (k)



4:41 / 8:01



Tax Impact Calculator



Tax Increase if Master Facility Plan Approved

District 99 has stated that the annual increase of the Master Facility Plan on its portion of the property tax bill for a house with an average market value of \$300K will be \$65 per year. This is a net increase based on the fact that existing bonds are retiring in 2018. To calculate the estimated net increase on the District 99 portion of your property taxes, please enter the market value of your home.

Enter the market value of your home (do not use commas):

If the community approves the proposal, the estimated net annual increase on the District 99 portion of your property tax bill starting in 2019 will be:

\$64.86

Average house = \$65/year

Tax Decrease if Master Facility Plan Not Approved

If existing bonds are retired and no new bonds are issued to improve our schools, the District 99 portion of property taxes for a house with an average market value of \$300K will decrease by \$132 annually.

If the community does NOT support the proposal, the estimated annual decrease on the District 99 portion of your property tax bill (based on market value entered above) starting in 2019 will be:

\$132.07

Tax Impact Analysis if the Community Approves the Master Facility Plan

Based on the market value of the home entered above:

The District 99 portion of your property tax bill starting in 2019 that will go to support the cost of new bonds and interest if the community approves the Master Facility Plan:

\$196.93

As indicated above, the amount of your property taxes that you're currently paying for old bonds and interest that will retire:

\$132.07

As indicated above, the estimated annual net increase on your property taxes if the community approves the Master Facility Plan will be:

\$64.86

The estimated monthly net increase on your property taxes if the community approves the Master Facility Plan will be:

\$5.41

This is the total amount of bond and interest that will allow District 99 to make **all of the changes** contained in the Master Facility Plan.



22,000
votes

27+%
turnout

**Polling Indicated
61% Support**



**Results
62% Yes**



20 weeks to 1st day of school



Accelerate Cold Air!

"It cannot be cold enough on the 1st day of school."



Opportunity to Celebrate and Communicate Key Messages:

- ✓ **Thank you** for investing in our schools
- ✓ Projects will be delivered **on time** & **on budget** – we are fiscally responsible
- ✓ Construction will take place from **spring 2019 to fall 2021**
- ✓ This is an **important time in District 99's history**
- ✓ We are **delivering more than promised** – within the same budget



Looking back, to not repeat the past

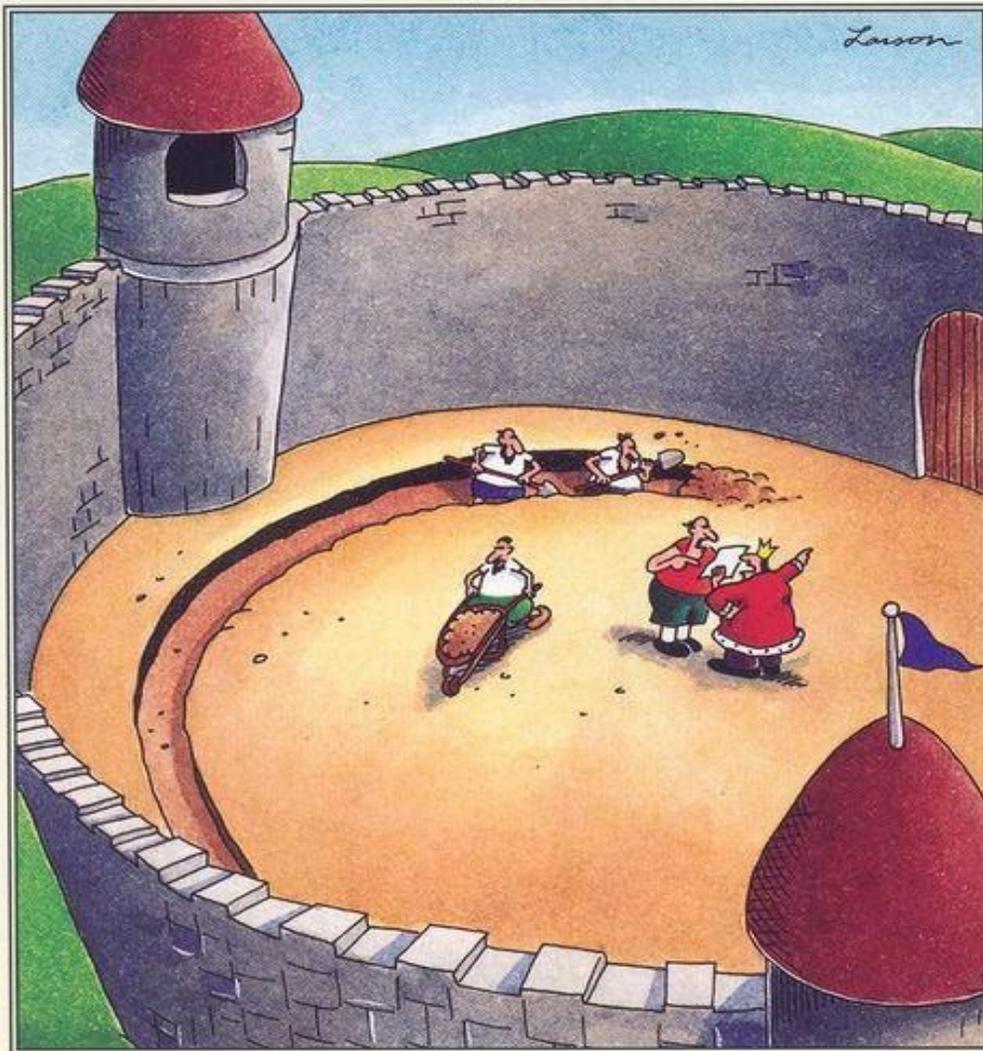


CHSD 99 Building Program from 20+ years ago



4/16/90

Larson



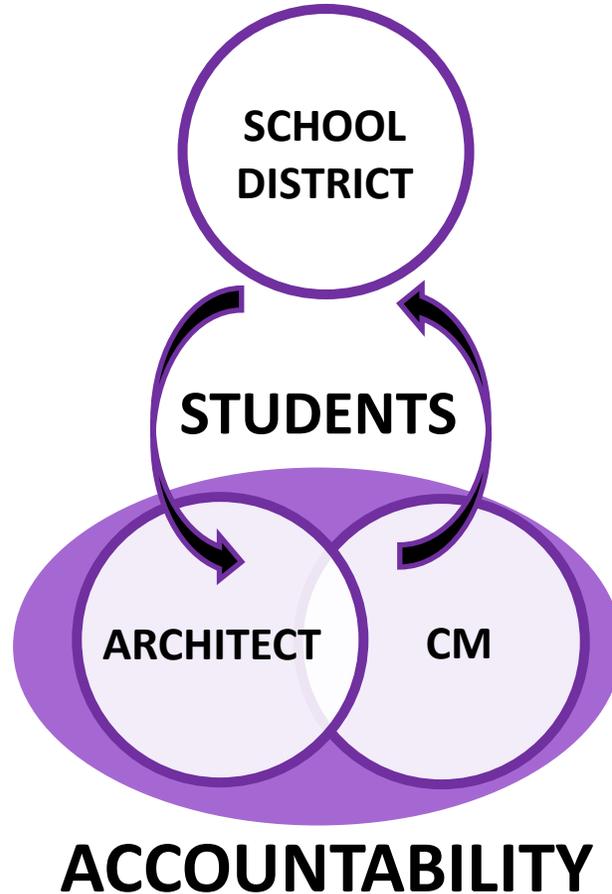
Suddenly, a heated exchange took place between the king and the moat contractor.

2022 ANNUAL CONFERENCE

#iasboAC22

STRONGER TOGETHER. SMARTER TOGETHER.

District experience needed to be better



not



Team focus had to be different



BUILDING

not



BLAMING

Finding value vs. cutting scope



VALUE FOR STUDENTS

not



CUTTING SCOPE

Early budget certainty was highly valued



How that was achieved



**Rethought
Debt Strategy**



**One Team
One Focus**



**Deep Staff Engagement
During Design**

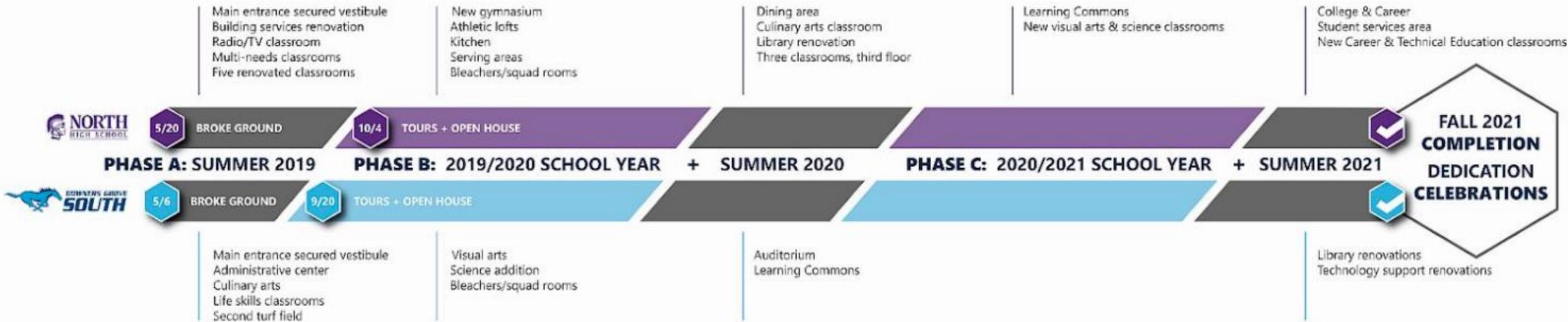


**Shared Success
Along The Way**

Communicating Progress and Results to your Community



CONSTRUCTION: WHAT & WHEN?



Communicating Progress and Results to your Community



Facility Friday for September 28, 2018

Thank you for subscribing to Facility Friday, a weekly update that we will publish throughout the design and construction of the Master Facility Plan (MFP) at Downers Grove North High School and Downers Grove South High School. [Suggestions are welcome!](#)

Questions? Please email us and we will add your question—and our answer—here next week!



Facility Friday for December 7, 2018

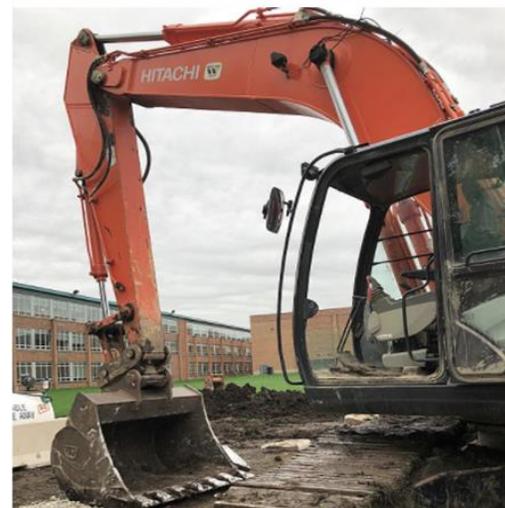
Thank you for subscribing to Facility Friday, a weekly update that we will publish throughout the design and construction of the Master Facility Plan (MFP) at Downers Grove North High School and Downers Grove South High School. [Suggestions are welcome!](#)



Facility Friday for May 17, 2019

Thank you for subscribing to Facility Friday, a weekly update that we will publish throughout the design and construction of the Master Facility Plan (MFP) at Downers Grove North High School and Downers Grove South High School. [Suggestions are welcome!](#)

Construction Has Begun!



Facility Friday for May 15, 2020

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DGN Progress



Work has been completed to prepare for the installation of North High's home bleachers, which will begin on Monday. In addition, ductwork and insulation are underway in the gym, kitchen, multipurpose and gymnastics loft, and electrical and ductwork will be installed in the remaining work areas.



STRONGER TOGETHER. SMARTER TOGETHER.

Communicating Progress and Results to your Community

Master Facility Plan Update

2020-09-22 15:54:55

08:33 Helping address some of that in our community.

Hank Thiele

08:36 So we'll share some of those resources where they can find them on our website. We'll talk about master facility plan. If you haven't been back by the schools, yet it's pretty impressive to see the amount of work.

08:47 That's going on and you can really start to get an idea of what these common spaces will look like as well as some of the other spaces and the

Upgrade Culinary Lab Equipment
to allow Classroom, Lab, Demonstration Kitchen, and Common Space to serve 2 sections in one period (creates parity with South)

Estimated Cost
\$100,000 - \$110,000

1 1/2 LABS - Additional Equipment and Infrastructure

- (4) Wall Ovens
- (1) Commercial Range With Oven
- (1) Combi Oven/Steamer/ Charboiler/Griddle
- (1) Worktable
- (3) Mobile Prep Stations
- (1) Dishwasher In Demo Kitchen
- Exhaust Hood - Additional Equipment
- Additional Infrastructure - Additional Equipment
- Wall Ovens And Cooktops In Culinary Lab In Lieu Of Ranges

2019-11-11 CSD99 School Board Meeting
114 views • Nov 13, 2019

COMMUNITY HIGH SCHOOL DISTRICT 99
SUPERINTENDENT DR. THIELE HOSTS

Lunchtime LIVE

Live Zoom Webinar | Thursday, January 28 | noon

South High

2021-01-28 12:08:45

07:32 We continue our meal distribution that is going on every Monday from noon till five at both North and South High if you go to cst 99 dot org slash meals.

07:43 You can get information of how to access that program and we're providing food for anybody any child under the age of 18 in the entire community that can access this program, and this is offset by the usda.

08:01 master facility plan continues to be underway.

08:05 This is a picture of the auditorium itself high the seats are starting to go into the balcony there.



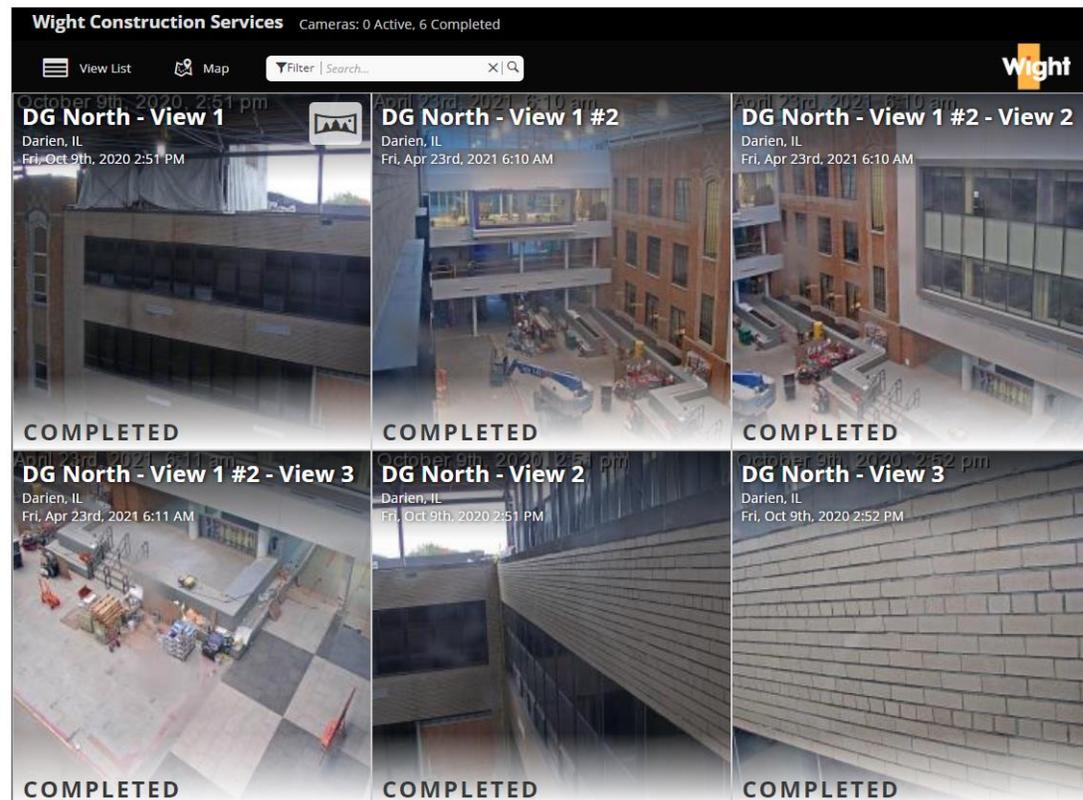
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Communicating Progress and Results to your Community

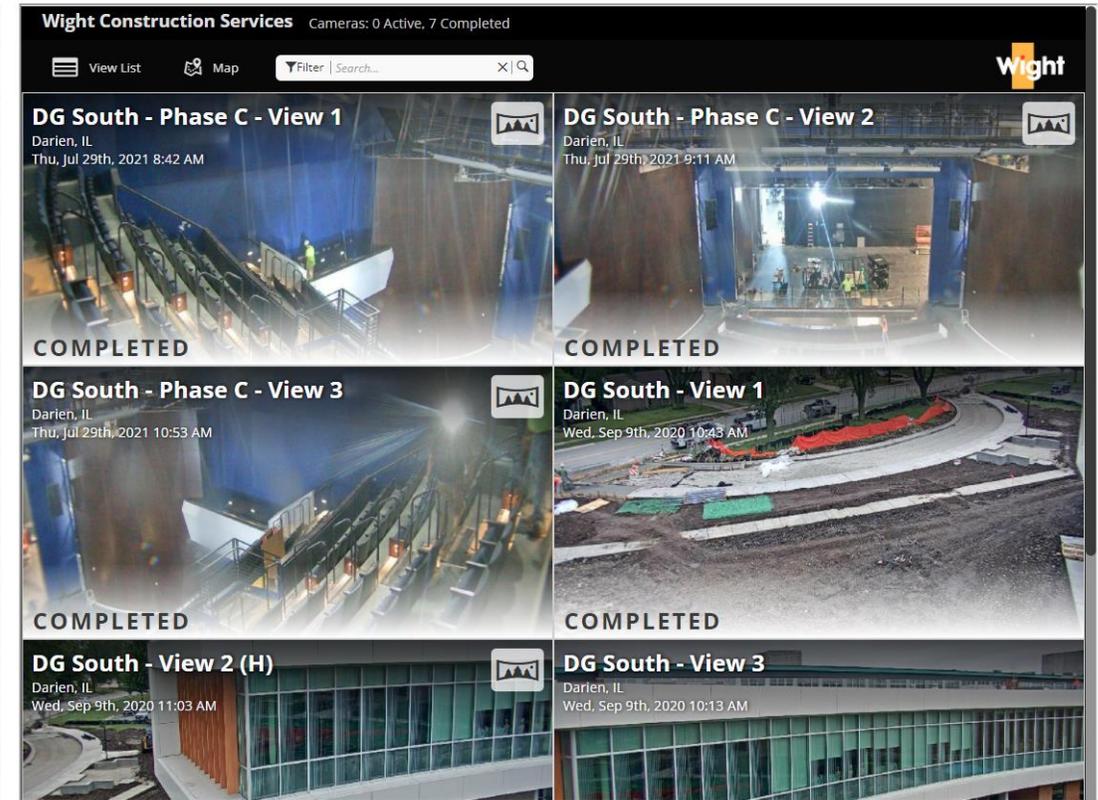
North High MFP Construction Camera

See the construction of the Master Facility Plan in action below! Click on the images to see different angles of the construction underway on the northeast side of North High. After you select a camera view, click on "time lapse," which shows you the work done to date in 30 seconds!



South High MFP Construction Camera

See the construction of the Master Facility Plan in action below! Click on the images to see different angles of the construction underway on the northeast side of South High. After you select a camera view, click on "time lapse," which shows you the work done to date in 30 seconds!



Communicating Progress and Results to your Community

Tax Impact

Average house = \$65/year

Adjusted Bond Sale Strategy

Saved \$37M in costs for taxpayers



Communicating Progress and Results to your Board of Education

Date
6/10/2021

CHSD 99 MFP Implementation
Financial Summary North & South

Contract Value	Remaining Contingency	Remaining FF&E Allowance	Remaining Contractor Allowances			
122,135,830	486,338 <small>Estimated at Completion</small>	190,716	Phase A	Phase B	Phase C	Site Improvements
			25,953	6,534	523,850	37,661

SOUTH

Description	Original Budget	Current Budget & Committed	Estimated at Completion
Hard Costs	56,581,498	\$59,644,879	60,285,543
Phase A	10,999,676	\$8,160,441	8,160,441
Committed	9,215,063	\$8,160,441	8,160,441
Unlet	1,784,613	\$0	0
Phase B	10,770,300	\$9,515,163	9,514,096
Committed	8,521,169	\$9,515,163	9,514,096
Unlet	2,249,131	\$0	0
Phase C	31,063,104	\$36,358,790	36,931,228
Committed	32,673,721	\$36,331,253	36,774,525
Unlet	-1,610,617	\$27,537	156,703
Site Improvements	3,748,418	\$5,493,882	5,483,387
Committed	4,929,880	\$5,493,882	5,483,387
Unlet	-1,181,462	\$0	0
WCS/D99 Direct Purchases	0	\$116,601	196,391
Contingency	3,430,630	\$367,249	-224,991
General Requirements	359,500	\$359,500	359,500
General Conditions	3,300,195	\$3,300,195	3,300,195
Preconstruction Fees	40,000	\$40,000	40,000
CM Fees	1,049,976	\$1,049,976	1,049,976
Insurance	625,000	\$625,000	625,000
FF&E Allowance	2,500,000	\$2,500,000	2,451,576
Owner Budget Costs	0	\$0	0
Total	67,886,798	\$67,886,798	67,886,798

Hard Costs ● Committed ● Unlet

\$59,617,342

NORTH

Description	Original Budget	Current Budget & Committed	Estimated at Completion
Hard Costs	42,295,215	\$44,735,356	44,952,012
Phase A	7,393,856	\$6,742,559	6,702,559
Committed	7,690,013	\$6,742,559	6,702,559
Unlet	-296,157	\$0	0
Phase B	15,172,623	\$10,928,830	10,929,804
Committed	9,602,813	\$10,928,830	10,929,804
Unlet	5,569,810	\$0	0
Phase C	15,193,736	\$22,670,834	22,868,169
Committed	19,557,684	\$22,670,834	22,868,169
Unlet	-4,363,948	\$0	0
Site Improvements	4,535,000	\$4,270,602	4,294,548
Committed	3,241,870	\$4,270,602	4,294,548
Unlet	1,293,130	\$0	0
WCS/D99 Direct Purchases	0	\$122,531	156,932
Contingency	4,357,559	\$1,975,679	711,329
General Requirements	359,500	\$359,500	359,500
General Conditions	3,342,696	\$3,342,696	3,342,696
Preconstruction Fees	40,000	\$40,000	40,000
CM Fees	816,660	\$816,660	816,660
Insurance	537,401	\$537,401	537,401
FF&E Allowance	2,500,000	\$2,441,739	2,089,433
Owner Budget Costs	0	\$0	1,400,000
Total	54,249,032	\$54,249,032	54,249,032

Hard Costs ● Committed ● Unlet

\$44,735,356

MFP IMPLEMENTATION

Description	Original Budget	Current Budget & Committed	Estimated at Completion
Hard Costs	98,876,713	\$104,380,235	105,237,555
Phase A	18,393,532	\$14,903,000	14,863,000
Committed	16,905,076	\$14,903,000	14,863,000
Unlet	1,488,456	\$0	0
Phase B	25,942,923	\$20,443,994	20,443,900
Committed	18,123,982	\$20,443,994	20,443,900
Unlet	7,818,941	\$0	0
Phase C	46,256,840	\$59,029,624	59,799,397
Committed	52,231,404	\$59,002,087	59,642,694
Unlet	-5,974,564	\$27,537	156,703
Site Improvements	8,283,418	\$9,764,484	9,777,935
Committed	8,171,750	\$9,764,484	9,777,935
Unlet	111,668	\$0	0
WCS/D99 Direct Purchases	0	\$239,132	353,322
Contingency	7,788,189	\$2,342,928	486,338
General Requirements	719,000	\$719,000	719,000
General Conditions	6,642,891	\$6,642,891	6,642,891
Preconstruction Fees	80,000	\$80,000	80,000
CM Fees	1,866,636	\$1,866,636	1,866,636
Insurance	1,162,401	\$1,162,401	1,162,401
FF&E Allowance	5,000,000	\$4,941,739	4,541,009
Owner Budget Costs	0	\$0	1,400,000
Total	122,135,830	\$122,135,830	122,135,830

Hard Costs ● Committed ● Unlet

\$104,352,697

Communicating Progress and Results internally within the District



**Superintendent
Dr. Hank Thiele**



**Phys. Plant & Ops
Jim Kolodziej**

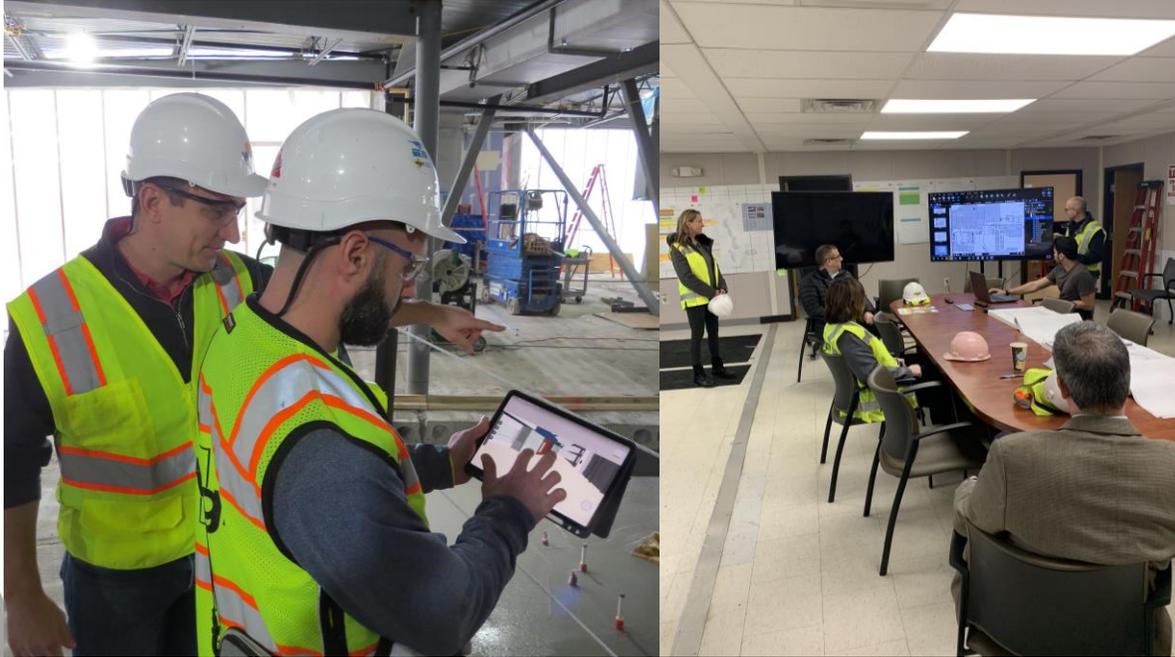


**Accounting
Staff**



**Teachers &
School Staff**

Communicating Progress and Results internally across the Team



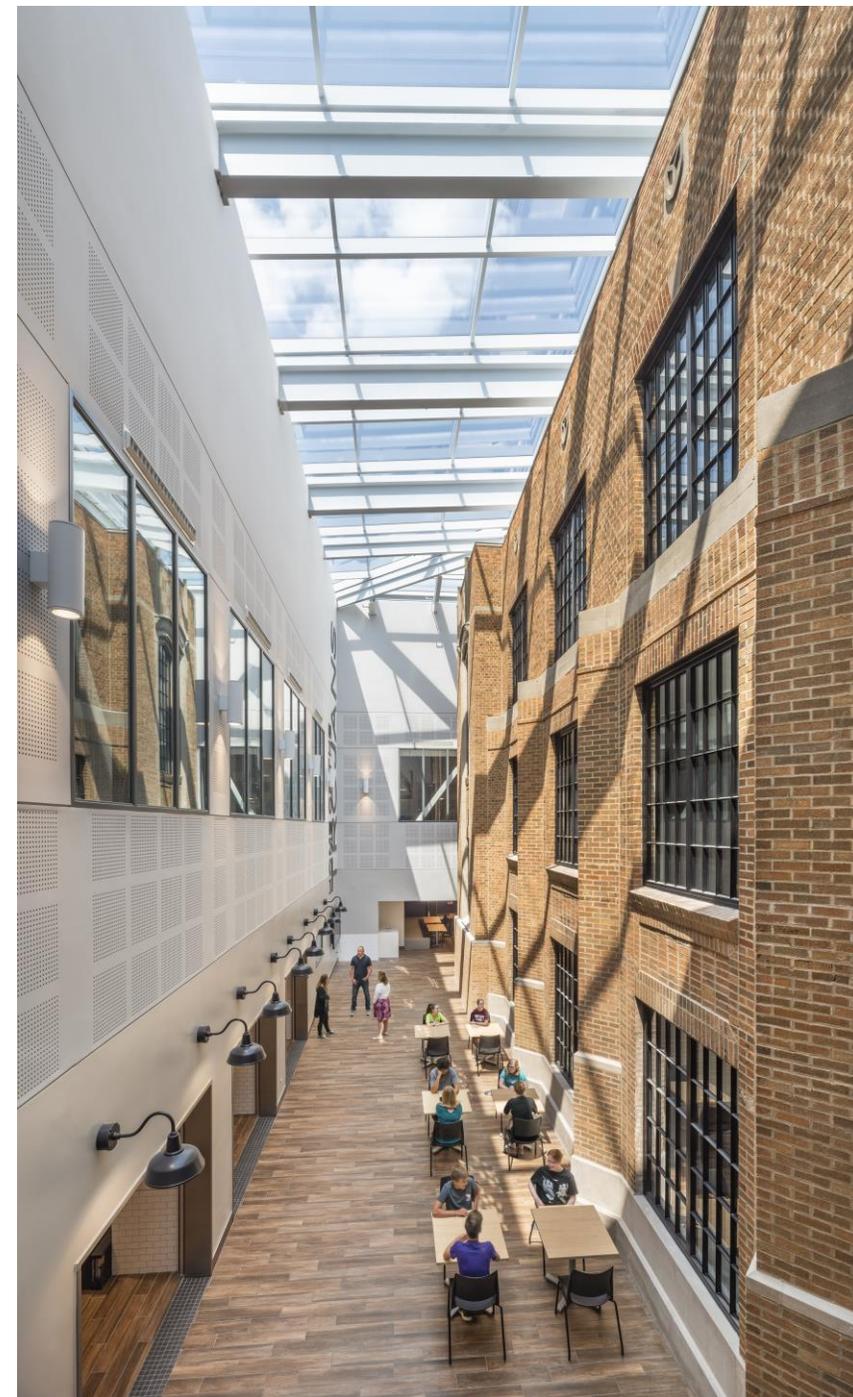
Design & CM Team



Financial Team
Bond Underwriter
Bond Advisor
Investment Partner
(arbitrage management)



Outcomes Downers Grove North HS



Outcomes Downers Grove North HS



Outcomes Downers Grove South HS



Outcomes Downers Grove South HS



Results

- ✓ Referendum budget guaranteed within 6 months of election day
- ✓ Bond sale strategy saved \$37M in total bond costs
- ✓ Completed 1 year earlier than likely possible vs. traditional delivery
- ✓ Avoided cost escalation and extended general conditions costs
- ✓ Absorbed \$19.6 M of MFP improvements beyond expectations
- ✓ Avoided est. \$2.9 M fee/overhead mark-up on changes/added scope

District needed to shape & control this message



Celebrate success often



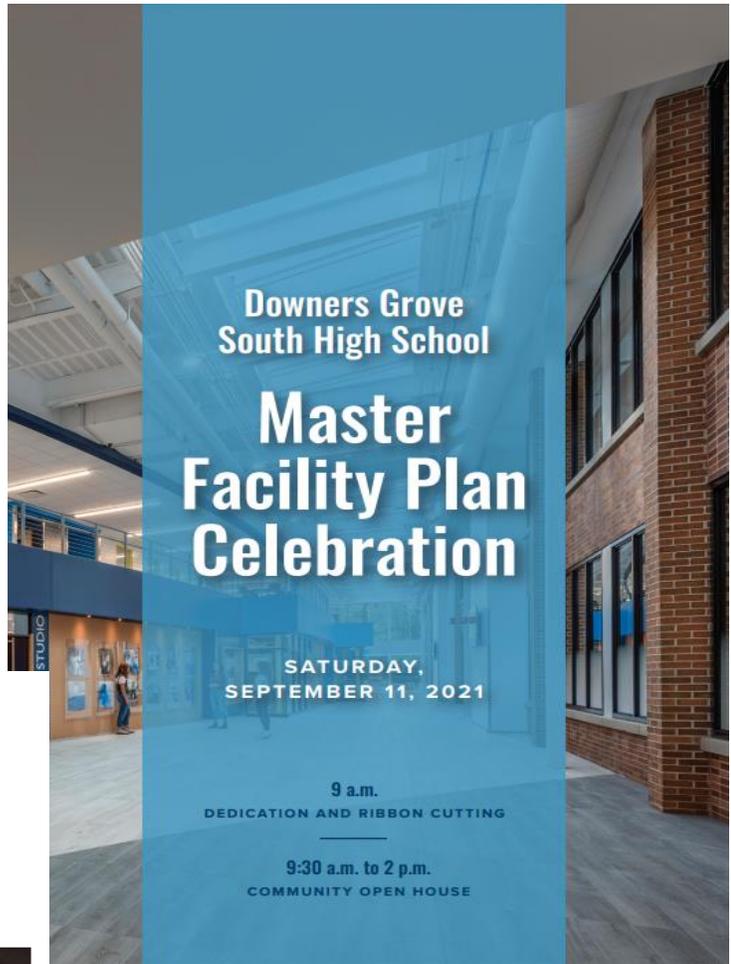
North High Construction Information



NORTH HIGH SCHOOL

[Click here to see the North High construction camera!](#)

North High - Master Facility Plan - Phase B Video Tour



STRONGER TOGETHER. SMARTER TOGETHER.

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Key Messaging Themes

- ✓ **Address more of MFP objectives than originally thought possible**
- ✓ **Still remaining within the established funding approved by voters**
- ✓ **Stayed true to the goals of the MFP**
- ✓ **Emphasis on delivering value...within framework of approved MFP**
- ✓ **Allowed District to meet BOE's goal to deliver more than promised**
- ✓ **Added projects held back from scope based on initial budget concerns**



Primary Lessons Learned

7 Key Takeaways

- 1. Be comfortable making bold decisions**
- 2. Consistent transparent communications builds trust, results in success**
- 3. Integrate communications into (and across) your project team**
- 4. Find partners that focus on team, trust, and accountability**
- 5. Always strive to deliver more**
- 6. Anchor decisions around the benefits for students**
- 7. Connect messaging to what the community approved**





Questions and Answers

We thank you for your time!



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STRONGER TOGETHER. SMARTER TOGETHER.

Presenters:

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