

2014 OSBA BONDS, BALLOTS & BUILDINGS



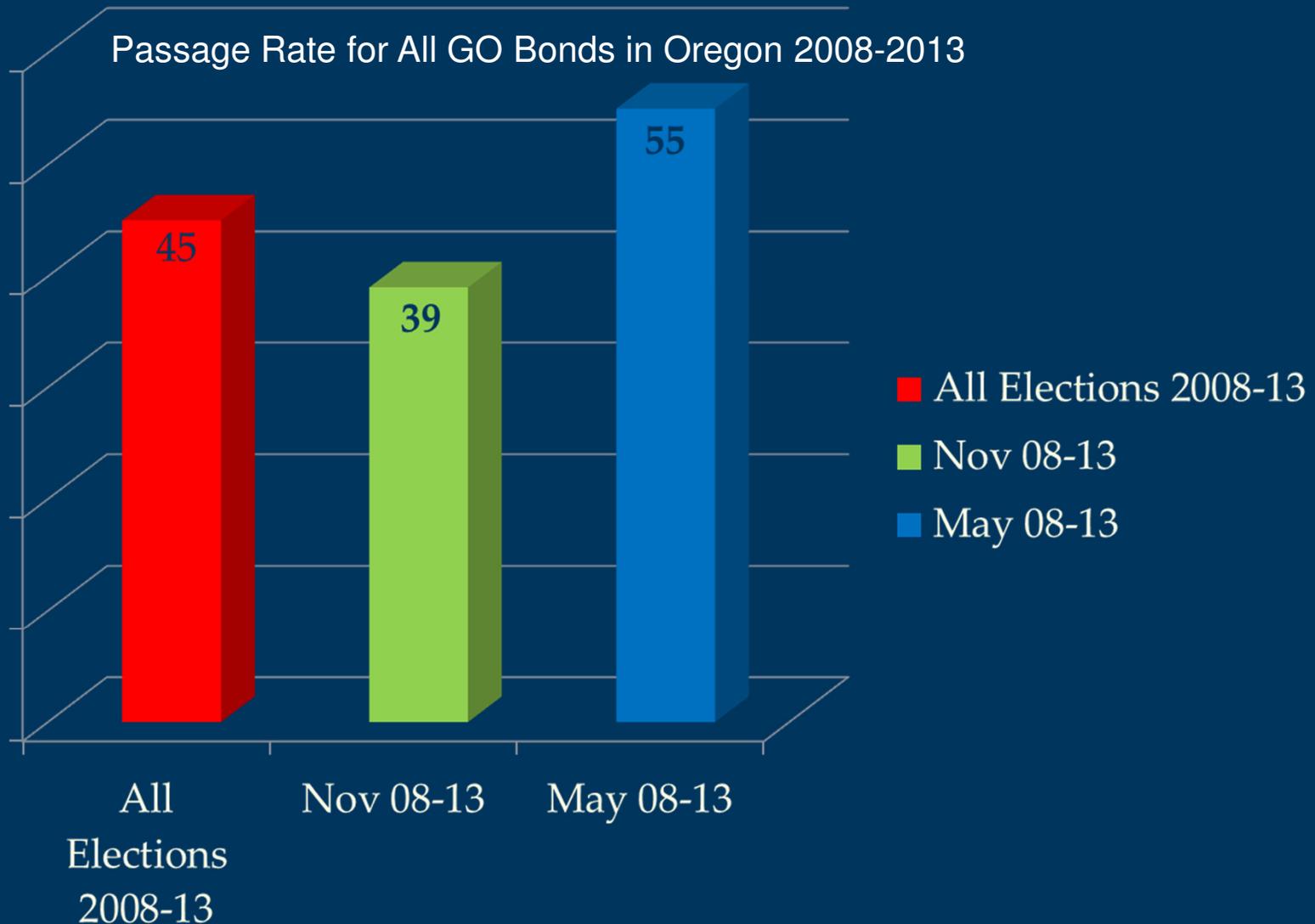
Community Perceptions & Election Timing



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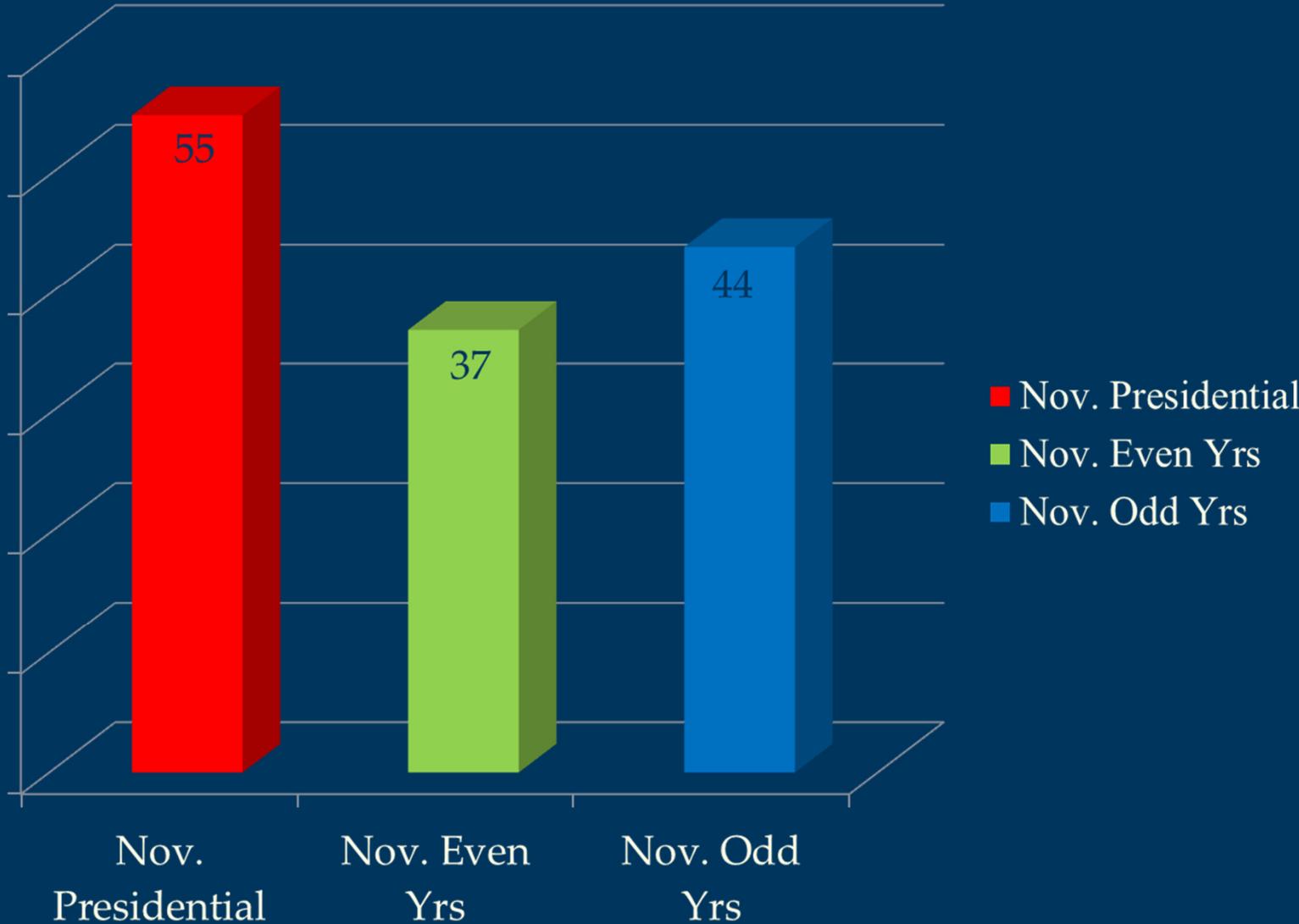
What are your odds?

45% of all School District GO bonds have passed since 2008



GO Bond Success in General Elections 2000-2013

SD GO Bond Success: Presidential vs. Even Non-Pres. Yrs. vs. Odd Non-Pres. Yrs.



Taking a Closer Look



- **Since 2008, 55% of districts passed bonds in May Elections (22/40).**
- **Since 2008, only 39% of districts passed bonds in November General Elections (26/67).**
- **2000-2012, 55% of districts passed bonds in Presidential General Elections (41/75).**
- **2001-2013, 44% of districts passed bonds in Non-Presidential General Elections in odd years (7/16).**
- **2002-2010, 37% of districts passed bonds in Non-Presidential General Elections in even years (25/68).**

2013 Election Data

- **In November 2013 only 23% of school districts passed their bond proposals.**

- **In May 2013 only 40% of school districts passed their bond proposals.**

What may be impacting recent passage rates?

- General negative perception/mistrust of government/economic concerns.
- Perception that districts only communicate with public when looking to pass a money measure.
- Focus campaign/communications only on parents who have children in school.
- Ignoring the most frequent voter populations.
- Perception that districts don't listen to the community's concerns/priorities.
- Lack of education about what is going on in the district/building conditions, educational programs etc.

GETTING TO KNOW YOUR DISTRICT'S VOTERS

Knowing the demographic make-up of your community is vital before embarking on any campaign.

Reading Your District's Individual Demographic Profile

- Each box includes a title and highlights voters in your community in a variety of different ways:
- Top box highlights all voters.
 - Review your total voters/total households/totals by gender/age.
- Who are your most frequent voters (see box titled voters who voted in 3 out of 4 and then box titled 4 out of 4 elections)?
 - What is total percentage of 4 of 4 voters over the age of 45?
 - What is total percentage of 3 of 4 voters over the age of 45?
 - What percentage of your voters are seniors?



What do we know?



- 80%-90% of the most frequent voters (3 of 4 elections, 4 of 4 elections) in most communities are over the age of 45.
- Voters voting in only 1 out of 4 elections and 2 out of 4 elections are unlikely to vote and even if messages are positive in these groups it's very difficult to motivate them to vote.
- Respondents over the age of 55 are key demographics can mean the difference between the success or failure of a bond/levy proposal.
- Typically, females tend to be more supportive of schools.
- More information, not less, typically solicits higher levels of support from nearly all demographic groups.
- Geographic areas within a community can respond very differently depending on the message being delivered.

How many votes to win?

- Your # registered voters _____
- X expected % turnout _____
- = # who will probably vote _____
- 50% + 1 needed to win = _____
- + 25% to assure a win = _____
- = Total needed to win _____

Why Conduct Public Opinion Survey Research?

- Telephone surveys are the most efficient method for collecting information about a large group of people.
- It provides opinions from a small representative subset of a population in order to generalize to the whole.
- It assists in the initial decision-making process, the development of messages and in the overall management and execution of a campaign.
- Ensures interviewers don't introduce bias when asking survey questions.
- Solicits more honest responses from respondents because questionnaire is administered by a third party.
- Voters can be schizophrenic. While they may want "high quality" education, they differ as to their individual definition of "high quality" and how much they are willing to pay for it.

Campaign Survey Research

Bond Measure/Operating Levy Surveys—

- Tests general community perceptions about school district.
- Tests general support for bond measure.
- Survey should be conducted at least 6-12 months in advance of election.
- Assists district in determining whether there are messages that positively/negatively impact support.

Questionnaire Formats



▪ District performance

- Informs district if there are general areas of concern in the community.
- There is a direct correlation between community perceptions and a district's ability to pass a bond.

▪ Money Management

- Informs district if community has positive/negative perceptions about how the district is spending public dollars.

▪ Rate Physical Condition of Buildings

- Informs district if community is aware of current issues with school buildings.

▪ Who's Ahead

- Non-biased questions that outlines bond measure costs/individual components/cost to taxpayers.
- Costs must be included in this question to provide accurate support levels.
- All subsequent messages are measured against the results from this question.

▪ If you Knew

- Tests one piece of information and asks how respondent would vote based on that information.
- Helps districts identify what messages move people in favor or in opposition of a bond measure.

Questionnaire Formats continued

▪ **Priority Series**

- Tests individual components along with cost.
- Informs district in priority order what projects community supports/does not support.
- Informs district if there is a component with so little support that it may cause a bond measure to fail.

▪ **If you had to choose**

- Used if there are multiple bond amounts the district wants to test.
- Used if there are competing measures on the ballot (city/fire/community college, etc.) and how it impacts support for school district bond.

▪ **Agree/Disagree**

- Provides purposefully prejudicial statements that re-test messages included in the “if you knew” or “priority” series.
- Tells districts how strong individual messages are and whether the community actually believes the message or if the district needs to do further education.

▪ **Second Who's Ahead**

- This is not vital to integrity of questionnaire but does tests the impact questionnaire messages had on support for the proposal.

Reasons Districts are Going Out for Bonds

You Tell Us:

- What are some of the primary reasons you are considering going out for a bond measure?
- What types of projects are being considered in your bond proposal?
- What types of messages do you believe are resonating in your community?
- What do you think the community's perception is of your district?

Positive/Negative Hot Buttons for Bonds



Positive Bond Measures:

- Protecting community's investment in buildings roofs/plumbing/electrical upgrades.
- Energy efficiency improvements related to new equipment, and/or building improvements will save operating costs.
- Refinance of debt will lower interests rates, save taxpayers \$.
- Cooperative endeavors between public entities (example: community centers and schools).
- Maintaining level property tax rates.
- Equal access to technology for improved student learning.

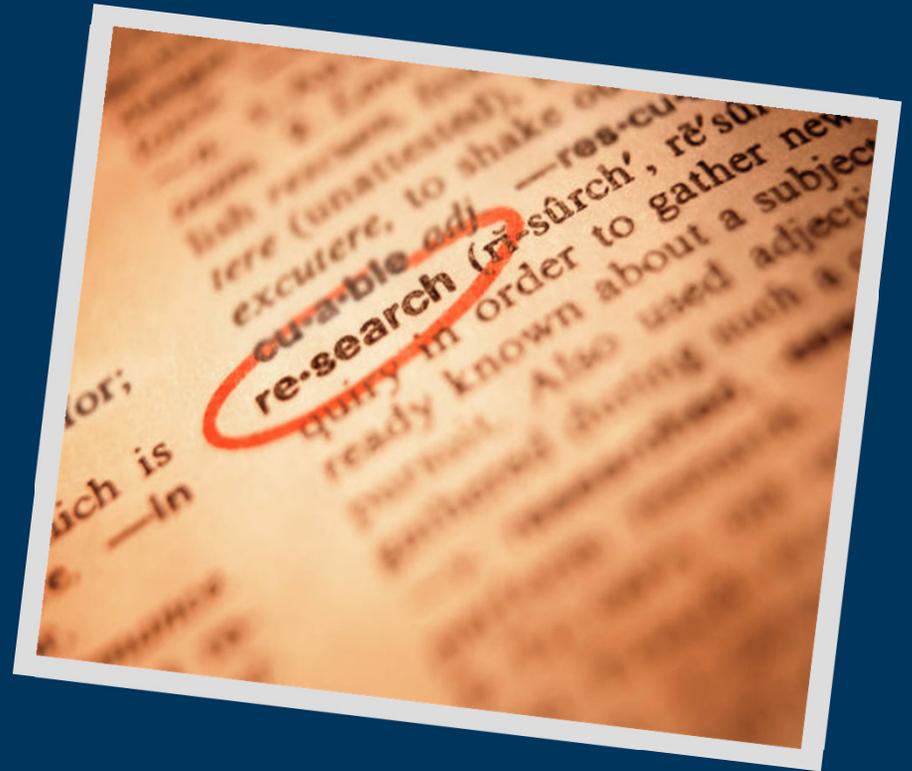
Negative Bond Measures:

- Replacing athletic fields/ stadiums/artificial turf/gyms etc.
- Property purchases for future facilities.
- Constructing performing arts buildings.
- Tearing down facilities residents have strong sentimental attachment to.
- Unreasonable cost.
- Components respondents don't believe are priorities.
- Negative press about district. Communities have VERY long memories.

Group Activity: Split into 2 Groups

Use Executive Summary to:

- Determine what demographics are most supportive/least supportive of measure.
- Use voter profile worksheet from district in example to identify the number of voters in each group that favor measure.
 - At their usual frequency how many votes would that yield?
 - Is that enough votes to win?
- What messages draw most support/decrease support for measure?
- Using top 2 messages, & voter profile, identify voters in each group that favor with the new message.
 - How many votes will that yield?
 - Will that yield enough votes to win?
- Come up w/communications plan. Who will you target? What messages will you deliver to whom? What messages will district deliver vs. citizen group?

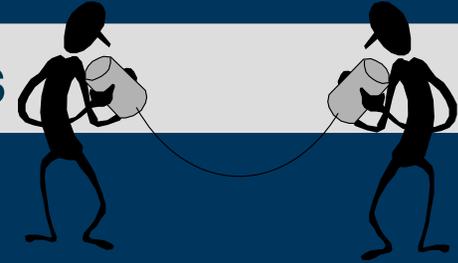


Results of Group Exercise:

You Tell Us:

- **Pick a representative from each group to share:**
 - What you learned.
 - Can the bond be successful?
 - How would you structure your communications plan based on the survey results?
 - What messages would you deliver to what demographic groups based on your survey results?
 - What strategies would you use to reach those demographic groups?
 - Are there any components you would remove from the bond due to survey results? If so, what? If not, why?
 - What messages would the district deliver vs. citizen group deliver?

Other Important Aspects



Don't be afraid to ask the hard questions

- Districts **must** test both positive and negative messages so they know how each message impacts the other and whether or not there are positive messages that effectively counter the negative messages.

Be prepared to repeat messages; over, and over, and over...

- If a message hasn't been tested **do not** use it! Whatever you do **STAY ON MESSAGE.**

If bond is altered to reflect community priorities, tell the community you listened!!

Surveys don't always deliver "good news"

- Be prepared to go back to the drawing board or do additional education so community understands the district's needs.

Don't assume ANYTHING

- Just because results look promising, you must pay attention to your frequent voters. If you don't have their support, then passing a bond will be next to impossible..

After the bond has passed:

Keep communicating with your community:

- Keep the community updated about how construction is going through:
 - Website
 - Newsletters
 - Newspaper Articles
 - Direct Mailings
- Keep the community updated about how bond proceeds are being spent:
 - Especially if projects come in under budget.
- Let the community know who your contractors are; especially if district uses local subcontractors.
- **WIN OR LOSE, THANK THE VOTERS!!**



SMALL DISTRICTS UNABLE TO SURVEY

Enumeration

- Solicit group of volunteers to telephone everyone in the community.
 - Labels & Lists sells phone lists costing between \$175-\$200.
- Design universal **unbiased** script asking whether they would favor/oppose bond measure.
 - Total cost of bond measure **and** cost to taxpayers should be included in question.
 - Example: Hi, I'm _____. The ____ School District is considering a \$__ million bond measure that would pay for ____ and _____. This proposal would cost property taxpayers \$__ per thousand of assessed value. Would you favor or oppose this proposal?
- Have volunteers identify those who favor and oppose directly onto phone list.
 - Tally support.
- Host public forums to talk about bond measure, why it's needed, what it will pay for, what it will cost and solicit feedback.
 - Host coffees/visit senior centers, diners/other popular places the community gathers.
 - Offer tours of school buildings needing improvement (they may look good outside but are falling apart inside).
 - Engage newspaper to run stories about upcoming bond/what it will pay for.
 - Send out **personalized** direct mailings (letter from parent telling a story).
- As election nears have volunteers contact "yes" voters and encourage them to VOTE!

The district's bond measure lost... Now what?

After a Loss:

- Determine what happened
 - Were there competing measures on the ballot?
- Solicit community input as to why the measure failed.
 - Was it too much money?
 - Were there components included that should have been dropped?
 - Was there overall support for the measure by district staff/board members?
 - Was there an opposition campaign?

Keep the conversation going:

- Go back to the drawing board.
 - Begin education campaign to help the community understand why construction projects are needed.
 - Consider a smaller proposal.
 - Repeat positive messages from survey for those projects included in a smaller proposal.
- Use the communication tools & venues developed for the campaign.
- Find out where voters are getting their information.
- Use a community perception survey to build more positive perceptions in the community.

Typical Questions Included In Community Surveys

Performance of district:

- Overall
- Financial
- Academic

Information Sources in Community

- Who are the district's main information sources?
- Positive/negative information heard in community.
- Information community members care most about.
- Use of district/school websites.

Identify community goals/priorities for schools

- Most important goals for next 5 years.
- Identifies academic/construction/financial priorities.

How Messages Can Be Tested To Impact Perception

Test specific messages related to financial perceptions

- Financial awards.
- Coming in under budget on construction projects.
- Percentage of budget spent on administration.
- District fund balances.

Test specific messages related to academic perceptions

- Percentage of graduates going to college.
- Percentage of graduates earning scholarships.
- Increases in graduate rates/reduction in drop-out rates.
- Academic awards.

Test school building priorities

- Which buildings does community recognize need improvements?
- What's their priority list and why?
- Are there messages that impact these priorities?

Final Take-Away

- Know the demographic make-up of your community.
- Hire a professional survey research firm to test any money measure being considered or conduct enumeration of your community through a volunteer network.
- Make sure questionnaire is designed to test all components of measure/levy along with costs.
- Don't be afraid to ask the tough questions.
- Once survey is complete, understand and target your messages to the appropriate audiences.
- Be prepared to repeat your messages over, and over, and over.
- Finally, develop a communication plan to give your money measure the greatest chance for success!

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Money Measures: “In It to Win It”

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To learn more, please visit our websites:

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