MAKING THE CASE FOR A BOND

Communicating with your Community Before and After You Place a Bond on the Ballot

Contact:
Jake Weigler, 503-432-6580
Jweigler@hilltoppublicsolutions.com

Ben Patinkin, 503-305-5166
ben@patinkinresearch.com
About Hilltop

Hilltop Public Solutions is a national consulting firm specializing in campaigns, coalition building, grassroots organizing, and communications strategy.

We have offices in Washington D.C., New York, Denver, Boston, Las Vegas, Billings, Missoula, Boise, and Portland.

I run the Oregon office, along with my colleague, Colin Cochran. I’ve worked on races large and small around the state.
STRATEGY: How we can plan for success

A successful bond campaign begins with a plan.

Without that plan you are in a reactive posture, responding to events and decisions as you fall farther behind on critical strategic goals.

Today we are going to talk about how you can build and implement a plan that uses your time and resources effectively to position a bond to pass.
Campaign Basics: Rules of the Road

• Time is the most precious commodity on a campaign

• Take stock of your assets, identify your liabilities

• Prioritize your activities and do them well

• Focus on your key messages

• Invest your resources where they have the most value
Campaign Components

• Audiences
• Messages
• Messengers
• Channels
• Roles
AUDIENCE
Who are we talking to?

Any communications and engagement conversation should begin by identifying who we are trying to reach. This matters for both messaging and prioritizing resources.

In a bond measure, that means voters. Specifically, the likely voters in an upcoming election. Bond approval requires convincing those voters to support the measure.
What do voters know about the work of your district?
Know your District

• Age demographics
• Voter makeup
• Election history
• Geographies
• Constituencies: Business community, labor, elected officials, community groups
• Supporters: Who cares about this measure?
MESSAGES:
What are we going to say?

First impressions matter, meaning you need to know the best way to make the case for your measure from the start of the campaign.

There is no substitute for polling, which tells you what voters actually think – rather than what you think they think. I strongly encourage you to watch the DHM webinar in this series on the value of research.
Focusing on the benefits
Bennies

People need to be convinced they are getting something for what they are giving up. That means focusing on the benefits to voters and the community of the bond.

That could be enhancing or preserving services, investments that will improve the qualify of life in the community, or even avoiding a potential threat (we will lose state funding, the community pool will close, etc.)
Ensuring consistent messaging

Voters are bombarded with information, meaning that we need to make the best case possible the first time. That means a few things:

- Consistent core messaging that is repeated throughout the campaign
- Tailored messaging when engaging specific audiences
- Prepared answers to frequently asked questions and opponents’ arguments
Messaging Costs

Any bond measure will ultimately include a price tag. The key to framing this is to put it in context of the benefits. In other words, “For this modest cost you get the following…”

- Average cost (eg. $ 1.00 per $1,000 of assessed value)
- Opportunity costs of foregoing the bond (higher cost of furthering delaying maintenance, loss of low interest rates)
- The value of a “replacement” bond
MESSENGERS: Who will talk for us?

When we are bombarded with information, we look to cues to trust the validity of that information. Who gave us that information is a critical criteria for how much we value it.

Most voters will either not be direct user of your services (schools) or don’t regularly notice the value of those services in the community (jails or roads).

Building out your campaign strategy requires identifying and recruiting effective messengers.
Potential Messengers

Looking for people known and trusted in the community:

• Teachers, Nurses, Firefighters, Law Enforcement
• Business community
• Faith & civic leaders
• Elected officials
• Board members
CHANNELS: Where can we reach our audience?

Now that you’ve identified what we want to say and who we want to say it to, our campaign must select how we can best reach these audiences.

As there will always more opportunities than you can take advantage of in the time available, prioritizing is critical. Again, pick where to spend your energies and do it well.
Many channels to reach voters

- District communications
- Local press & earned media
- Community groups
- Grassroots: door knocking, phone banking & community events
- Website
- Social media
- Direct Mail
- Paid TV, Radio & Digital advertising
ROLES:
How can we best implement the plan?

The plan provides the template for the work of the campaign, helping prioritize activities and match the work of the campaign to milestones for success.

But that plan will only work if it clearly spells out responsibilities and accountability. A successful plan will match the activities resources available and include regular reporting to track progress.
Building Your Steering Committee

• Creating a steering committee

• Establishing roles, decision making, and accountability

• Identifying your volunteer base

• Hiring consultants and staff
Education versus Advocacy

It is critical as you are building your team that you make sure any public employees know their legal responsibilities regarding campaigns.

A public worker cannot advocate on public time. Public employees can only provide the public with info.

The Oregon Secretary of State will help ensure communications do not violate state election law.
About Patinkin Research Strategies

- Patinkin Research Strategies is a national consulting firm that focuses on public opinion research and communications strategy.

- We conduct work on behalf of state and local political campaigns, issue advocacy efforts, non-profit organizations, select businesses, as well as for state and local ballot measure efforts.

- Based in Lake Oswego, Oregon, firm principals have conducted polling and focus groups for dozens of local school districts and municipalities in our home state. Suffice to say, we know Oregon.
Building a successful bond package starts by reaching out to your community

- Before you embark on a bond process first seek to understand your audience. And when we say “first” we mean holding **listening sessions** preferably more than a year out *(at the latest).*

- What you want to ask and try to understand

  ✓ What are the core values parents, residents, staff, etc. attach to their schools and education more generally?
  ✓ What “interests” need to be recognized as your District plans for the future? By this, we want to know what things can assist or get in the way of achieving support for your proposed bond;
  ✓ What residents value about their current schools (what do they want to keep)?
  ✓ What residents want to gain from your proposed bond?
  ✓ What would a successful bond look like?
Why do we ask these questions?

- Because you need to meet your voters where they are.
- Constructing a bond that doesn’t reflect the core values and aspirations of your community will set your efforts back. It’s like trying to fit a square peg into a round hole.
- Getting that initial read on the values, concerns, priorities, and aspirations of your eventual communication audience will help you structure a bond that doesn’t reach too far, doesn’t do too little, but instead, matches your communities’ goals and beliefs when it comes to the education of students.
Who you should work to draw to listening sessions:

- Everyone. It’s critically important to get feedback on what residents want in a bond.

- BUT: some people are more important than others. Parents, staff, and students are the most critical attendees.

- WHY? Because community members without kids in the schools look to them when trying to make up their minds on how to vote. Making sure that you’re not stepping too far ahead of your patrons will go a long way towards ensuring the success of your bond.
A typical electorate has FAR more voters who DO NOT have kids in schools.

Voters without kids in schools: 70-80%

Voters with kids in schools: 20-30%
So who should you message to?

- Identified “yes” voters? **No.** There’s little value in communicating to a “yes” voter as they’re already with you. **The only reason to communicate with them is to get them to vote.** Understanding their reasoning for voting “yes” is also not worth the effort. They’re likely attitudinally very different from other groups.

- Identified “no” voters? **No.** There’s no value in communicating to a “no” voter as they’re not with you and the time and expense it would take to convince them otherwise isn’t worth it.

- Identified “undecided” voters? **YES!** These are the folks you need to educate, convince, and then move. And it’s likely they do **NOT** have kids in your schools.
Always remember, you’re trying to sell something:

Take every opportunity to tell voters in plain English (don’t get wonky) what they’re tax dollars are going to buy.

Make it clear that the things they are buying are things they like (safety, smaller enrollment or class sizes, 21st Century classrooms, basic repairs).

Reassure them—CONSTANTLY—that their money will be spent efficiently and accountably.
Incorporate previously identified core values in your messaging:

- Opportunity
- Thrive
- Accountability

- Family
- Quality of life
- Responsibility

- Equity
- Safety
- Success
Messages that work: communicating the basics

[OVERCROWDING] Many of the schools in our district are well above capacity. This bond will add classroom space and build improved schools that ensure greater equity, giving students more access to classes, more personalized attention and more sports and clubs helping to ensure they don’t fall through the cracks

[BASIC REPAIRS] This bond measure will allow the school district to make basic, large-scale repairs to school buildings, much like you might make to your house. This includes heating, ventilation, air conditioning, roofing, and plumbing. And just like with your own home, it will cost the school district more to fix these problems later if we don’t help take care of them today

[TEACHERS KNOW] Our children’s teachers need our help. Many of our school buildings are outdated, classrooms are too small and are in need of major renovation. This bond will bring better lighting, more access to 21st century technology, and ensure our kids’ classrooms have the most up-to-date education approaches possible.
[FIRE] This bond will help keep children and staff safe by adding or updating fire alarms and fire suppression systems in schools across the district.

[SECURITY] It’s our responsibility to do everything we can to help protect against school shootings. This bond measure helps us do that—funding new security technology, locking systems, security cameras and emergency communications that help keep students and staff safe in the case of imminent danger.

[EARTHQUAKE] If a big earthquake hits, we need really safe schools for our kids. This bond will make sure our schools are better able to withstand a major earthquake by improving seismic stability and bringing them up to modern earthquake safety standards.
Messages that work: show voters the ROI

[VOCATIONAL] This bond will enhance the learning and educational environment at the District’s Vocational and Technical Center, ensuring students get the hands on training in up to date lab spaces and classrooms they need to give them a head start on their careers.

[PROPERTY VALUE] Studies show that when we invest in high quality, up-to-date local schools it benefits our property values and quality of life by attracting more families and businesses that help make our community a better place to live, work and raise a family.

[TECHNOLOGY] With constant advances in computer technology, learning in today’s schools is different from what it was even 10 years ago. This bond will update technology in our schools ensuring every student has the technical skills and knowledge to compete successfully for college and good-paying jobs.

[21st CENTURY EDUCATION] We need to make sure students have access to 21st Century classrooms that give them an opportunity to thrive. This means creating an environment and atmosphere that helps students succeed including greater access to and use of technology in the classroom, improved energy efficiency and acoustics, meeting the needs of students with special needs, and greater access to external light.
Messages that work: build trust that the school district has its eye on the bottom line

[ACCOUNTABLE] The bond includes built-in accountability steps such as independent auditing and citizen oversight specifically designed to make sure our tax dollars are spent wisely and efficiently

[EFFICIENCY] Reinvesting in North Clackamas Schools will save taxpayers money by making its buildings more energy efficient, allowing the schools to redirect more dollars to the classroom where it belongs

[STATE] Our school district can secure a matching grant from the state to help keep our schools safe. Passing this bond ensures this state money is spent in our community, creating jobs and improving property values here, rather than in another part of Oregon
This bond is necessary in order to ensure our students graduate ready to compete in the worldwide economy;

It addresses critical problems, including chronic overcrowding and deferred maintenance;

And helps keep our children and staff safe in the case of an emergency such as a fire or active shooter situation;

Plus it's accountable to taxpayers, addressing problems now so they don't cost more later.
Another must: assess price sensitivity so you don’t ask for more money than voters are willing to spend.

The School District would put one library bond measure on the ballot in November 2016. I’m going to read you some descriptions of this possible bond. Knowing that the School District will only place one bond measure on the ballot, I would like you to tell me whether you will vote yes or no on each one. [IF YES/NO, ASK:] Do you feel that way strongly or not so strongly? [DO NOT ROTATE]

6. **[$15 MILLION]** One potential bond measure would cost eight dollars and 33 cents per month for a home with an assessed value of $175 thousand dollars. 

<table>
<thead>
<tr>
<th>Strongly</th>
<th>Not Strongly</th>
<th>Not Strongly</th>
<th>Strongly</th>
<th>DK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

7. **[$10 MILLION]** One potential bond measure would cost five dollars and 58 cents per month for a home with an assessed value of $175 thousand dollars.

<table>
<thead>
<tr>
<th>Strongly</th>
<th>Not Strongly</th>
<th>Not Strongly</th>
<th>Strongly</th>
<th>DK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

8. **[$8.5 MILLION]** One potential bond measure would cost four dollars and 75 cents per month for a home with an assessed value of $175 thousand dollars.

<table>
<thead>
<tr>
<th>Strongly</th>
<th>Not Strongly</th>
<th>Not Strongly</th>
<th>Strongly</th>
<th>DK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>
The most important thing you can do: structure a good ballot caption and question!

• **GOOD POLL TESTED CAPTION**: “Bonds to increase safety; repair, rebuild, construct schools; update classrooms.” (10 words)

• **GOOD POLL TESTED QUESTION**: “Shall District increase safety, repair, replace schools; update classrooms, technology; issue $XXX million dollars in general obligation bonds; audits and oversight required?” (20 words)
One way to use your messaging: Voters pamphlet statements—buy ‘em

- Unlike newspaper ads, many voters actually read them.

- You should focus on one key messenger per statement:
  
  ✓ Teachers
  ✓ Parents
  ✓ Firefighters
  ✓ Police
  ✓ Small business owners
  ✓ The Chamber
  ✓ Popular elected officials

- Repetition is your friend. **Find ways to repeat your core message in each statement, while still providing a compelling and unique story.**
Messaging goes beyond paid media and VPS statements—
EVERY DAY IS A MESSAGING OPPORTUNITY

Every board meeting, every work session, every PTA/PTO event is an opportunity to deliver message and this should start well before you ever place a bond on the ballot.

- What are the problems you are trying to solve through your bond?

- What are the goals and aspirations you are attempting to achieve for your community?

- What spokespersons or stories can you have told that help bring attention to your effort?

- What will the “Lake Oswego Review” headline say?

- If you have (hopefully not) a paid opposition campaign to contend with, what will the other side say?
Tough questions: demonstrate empathy and a willingness to listen when voters pose them—because they will pose them!

Acknowledge
- “Thank you for the question—for sharing your story.”
- “I understand your concern.”

Reframe the question to your ground
- “Your question is really about…”
- “The challenge before us all is…”
- “We can all agree that [common goal/value]…”

Pivot to your message
- “Our plan is designed to give every student…”
- “Our goal is to ensure the safety of students…”
Sample message box exercise:

**Leadership:**
Explain the goal and the vision to achieve it

**Key Issues:**
Always connect back to the central message

**Central Message:**
Focus on outcomes not process

**Values:**
Appeal to the core concepts first. Show values, don’t advertise them

**Contrast:**
Show the impacts of the wrong approach on students and the community
Concluding Thoughts

• Start early to can shape the conversation from the start

• A long build for a sprint to the finish

• Choose wisely where to put your time and resources
CONTACT INFO

Ben Patinkin
Patinkin Research Strategies, LLC
Email: ben@patinkinresearch.com
Phone: 503-305-5166

Jake Weigler
Hilltop Public Solutions
Email: jweigler@hilltoppublicsolutions.com
Phone: 503-432-6580