

# Funding Strategies

## EFFECTIVE POLLING FOR POWERFUL CAMPAIGNS

With record turnout anticipated for the upcoming November 2008 general election, many school districts have decided to run critical bond measure and levy proposals in hopes of voter approval.

- What are their odds of success?
- How do school districts find out what voters are likely to support?

*For this issue of Funding Strategies, we interviewed two experts to understand more about the role of polling in a successful election. Ben Patinkin is a Senior Analyst with opinion research and communication strategy firm Grove Insight. Mark Nelson, President and Founder of Public Affairs Counsel, has served as a campaign and public opinion consultant for more than 25 years.*

### WHAT IS POLLING?

An opinion poll is a survey of public opinion from a particular sample. Opinion polls are usually designed to represent the opinions of a population by conducting a series of questions and then extrapolating generalities in ratio or within confidence intervals (Source: Wikipedia.org).

### WHY IS POLLING USEFUL?

Public opinion polling gives decision makers information to measure constituents' perceptions of organizations, candidates, and policy directions. School districts planning to ask voters to raise taxes for a bond or levy package can use data collected in a poll to understand how voters feel about the district's overall performance, the quality of education in its schools, the district's use of tax dollars, and other key indicators.

According to Mark Nelson, polling provides critical insight on public opinions that affect a school district's ability to move forward with plans for the future. "Everyone believes they have a sense of what a community feels; sometimes they are right, but other times they are very wrong," says Nelson.

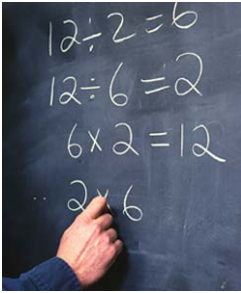
In order to maintain credibility with constituents, districts must carefully consider the odds of passing the request by understanding how voters are likely to react. "I have seen districts put measures on the ballot year after year – and fail time after time. It becomes more difficult the second or third time as voters begin to wonder what part of 'no' the district doesn't understand," says Ben Patinkin.

Polling gives school districts a wealth of data that can be used for bond and campaign planning. "Whether decision makers agree with the constituency or decide to do something different, the benefit is in having information as opposed to making 'seat of the pants' decisions," says Nelson.



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*Mark Nelson*



#### HOW DO SCHOOL DISTRICTS DESIGN/CONDUCT AN EFFECTIVE POLLING PROCESS?

Polling is a rigorous process best designed and conducted by professionals. For the most accurate results, hire a firm with expertise and depth of knowledge focused on school district and government polling. Once the polling firm is on board, they will help determine the appropriate sample size, as well as specific questions to ask survey participants. "You don't need to have a large sample size in order to get a good read on your district," says Patinkin. "Our typical sample size is 300 to 400 people, unless we are looking at some specific population of voters."

Asking the right questions is critical to understanding public perceptions in order to hone in on the components and messages that constituents value most. Mark Nelson designs questions for school districts to uncover the following information:

- *What is the public's perception of the school district in general?* In his experience, Nelson has found a direct correlation between high ratings of a district generally and the district's ability to pass a bond.
- *What is voters' base knowledge of the district?* For example, if buildings look pretty good on the outside, voters may not be aware of significant problems inside the buildings (e.g. leaks, safety and security, etc.). Polling helps districts understand what information needs to be disseminated to constituents well before launching a campaign.
- *What will people support?* As part of the survey, districts should give specific information on how much various components will cost, as well as cost per thousand of assessed value and total dollar volume requested in the package. Survey findings are useless if participants are not given enough information on which to base their opinions.
- *If you knew....?* For campaign purposes, it is valuable to drill down to find out which messages will make people more or less likely to favor or oppose the tax increase. For example, "If you knew enrollment would increase by 20% over the next five years, would you favor or oppose the measure?"
- *What are your priorities?* Nelson suggests asking voters to prioritize each component of the package on a scale of most to least important. Effective campaigns maintain a focus on the most important priorities when talking with the public.

#### WHEN SHOULD SCHOOL DISTRICTS POLL THEIR CONSTITUENTS?

Patinkin and Nelson agree that the first poll should be conducted approximately a year before the anticipated election. At this point, districts should have a basic idea of projects to be funded. However, districts may not have a good read on how people feel about the district in general, which elements of the potential bond or levy are most popular, or what voters would prioritize and be willing to support.

Design the first poll to elicit perceptions of the district's overall performance and to understand, in general, what voters are inclined to support. A second poll is useful to learn the details of which plan is more likely to be approved and what to emphasize to gain the most votes.

"The second poll should be done before writing the ballot question that will be printed by the election office," says Patinkin. "Phrasing the ballot question is the most important thing a campaign will ever do for a bond or levy — it is the one thing you know voters will see."

#### HOW CAN SCHOOL DISTRICTS USE THE INFORMATION GATHERED?

Survey results are critical to establishing specific bond package components, ballot language, and campaign messages. "It is much more successful for school districts to make decisions based on data," according to Nelson. "When we manage a campaign, we use survey research to help guide decision makers in determining what to put in front of voters and which messages will help to gain the most support."

In addition to designing and conducting surveys, many polling firms review district information and citizen advocacy campaign strategies to make sure focus is maintained on the right messages. Polling data can also be used to identify and segment any groups of constituents — athletic supporters, alumni, senior citizens, etc. — within a school district that need a specific strategy for outreach to encourage them to get out and vote, and/or to shift the trend towards a more positive direction.

#### WHAT IS YOUR ADVICE TO SCHOOL DISTRICTS SEEKING TO PASS BOND AND LEVY PROPOSALS?

For districts anticipating an election, Patinkin emphasizes that it is never too early to start raising money. "Regardless of your poll, you have to be able to mount the campaign, which takes money. If your poll shows around 50% support, you have a good chance of success if you take the information and really apply it to the campaign. The difference between success and failure is typically not whether a poll is right or wrong, it is whether you use the data to optimum effect," says Patinkin. "If you know a year out that you need to get on the ballot, put together a citizens committee and have them get out in the community and start raising money. That way you can build a solid campaign over the year to reach out to the community."



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Nelson advises districts to involve the community in developing bond and levy proposals. “It is more effective to involve people so they feel like they have input rather than leave it up to the Superintendent and the School Board. Go out and talk to the public about what they value in the buildings and what they want—then build a bond proposal to reflect their input,” says Nelson.

Public opinion polling is an effective way for school districts to understand their odds of success and to find out what voters are likely to support prior to placing a bond or levy proposal on the ballot. A professional poll provides the necessary data for districts to make informed decisions and to create compelling messages, resulting in good strategic campaigns.

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is to explore how school  
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