

planning for the upturn

In this challenging voter climate, many school districts are choosing to sideline bond and levy requests by putting off much needed new facilities and improvements to existing facilities while waiting for a stronger economic recovery.

In the business community, private companies in a recession fall into roughly three groups:

The bottom 10% go out of business.

The majority 80% survive by bumping along the bottom, waiting for the economy to improve.

The top 10% proactively plan and lay groundwork for the future upturn—and as things pick up, they are in a stronger position than before the recession.

So what can public school districts learn from private companies about weathering an economic downturn?

In this issue of *Funding Strategies* we explore the steps required for school districts, community advocates and architects to plan for the upturn—when the economy strengthens and voters are better positioned to say “yes” to bond and levy requests.

Like any other election campaign, school districts, architects and community advocates need to be working long before





the election date. In our experience, the facilities planning process for school districts needs to be underway a minimum of one year—but more typically two years—prior to the targeted bond election date.

While there is certainly no “one-size-fits-all” approach, following are the typical steps in an effective process that begins with facilities planning and ends with voter approval.

BOND CAMPAIGN PLANNING

A successful school bond campaign begins long before voters visit the polls. Below are helpful tips to guide your next bond measure plan.

ONE OR TWO YEARS PRIOR TO ELECTION					
Orient & Organize		Analyze & Explore			
<p>WHO: District</p> <p>WHAT: Assess educational delivery needs and facility implications</p> <p>ACTIVITIES: Solicit a Request for Qualifications/ Proposals for Architectural Planning Services Select an architect</p>	<p>WHO: District & Architect</p> <p>WHAT: Project kick-off</p> <p>ACTIVITIES: Determine methodology, schedule and outcomes Identify constituent groups; recommend methods to involve these groups in the process for successful long-range plan input Develop a list of characteristics for the proposed facilities planning committee members Develop a detailed work-plan including data analysis activities, proposed meetings, agendas and anticipated outcomes Identify specialists who might participate in the planning and determine how to best involve them</p>	<p>WHO: District & Architect</p> <p>WHAT: Evaluate recent district capital projects; identify valuable lessons learned</p> <p>ACTIVITIES: Tour facilities to assess functionality and evaluate ability to meet educational requirements Develop a list of "lessons learned" from previous construction bond projects to inform future capital projects</p> 	<p>WHO: District & Architect</p> <p>WHAT: Develop understanding of the district's educational mission & goals</p> <p>ACTIVITIES: Review the district's mission relative to educational initiatives Work with district representatives to understand: <ul style="list-style-type: none"> • Future student profiles • Educational delivery objectives • Sustainability goals • Technology directions • Facility standards • Possible community partnerships </p>	<p>WHO: District & Architect</p> <p>WHAT: Assess district's buildings to evaluate suitability to meet educational directives</p> <p>ACTIVITIES: Tour each facility and identify all deficiencies, including code compliance and building/site conditions Develop costs associated with repairs Interview building principals/staff to determine programmatic fit or shortcomings</p>	<p>WHO: District with Architect as Facilitator</p> <p>WHAT: Form a Citizens' Committee* to study capital needs</p> <p>MEETINGS MIGHT INCLUDE: Committee roles and responsibilities Current trends/best practices in education and facilities Tours of district facilities Preliminary needs and relative priorities Demographics and future enrollment projections and required facilities Prioritization of project work and identify phasing Criteria, planning scenarios and alternatives for the long-range plan Confirmation that long-range plan meets state regulatory requirements Presentation of plan options, budgets and potential funding sources Determination of need for capital bond or levy proposal</p> <p><i>*Committee could include parents, public agency representatives, district staff and community leaders such as business owners, realtors, developers, senior citizens, etc.</i></p>

SIX MONTHS PRIOR TO ELECTION	TWO MONTHS PRIOR TO ELECTION	ONE TO TWO WEEKS PRIOR TO ELECTION	Election Day	AFTER THE ELECTION			
Information & Advocacy	Pre-Election			Post-Election			
<p>WHO: District & Architect</p> <p>WHAT: Distribute district information</p> <p>ACTIVITIES: Develop renderings to illustrate projects Create display boards and brochure materials Voter registration drives School signage/ newsletters/ bulletin boards/ websites, etc. Send flyers home w/students</p>	<p>WHO: Community & Architect</p> <p>WHAT: Campaign Advocacy Committee (501 C4 Political Organization)</p> <p>ACTIVITIES: Plan fundraising with professionals, vendors, teachers' unions, staff, parents, etc. Assign campaign expenses, such as media, mailings, elections dept., food, gifts, etc. Create campaign messages/graphics Assign media relations, such as newspapers, billboards, radio/ TV, social media, websites, mailers, articles, etc. Start a speaker's bureau/outside endorsements Build a voter database with a registration drive, mailings, phone banking, voter reminder calls, ballot collection, etc.)</p>	<p>WHO: District</p> <p>WHAT: Election filing with County Elections Office**</p> <p>ACTIVITIES: Bond Counsel prepares notice of election including purpose for which the bond will be used, the amount and term of the bonds, the kind of bonds proposed for issue, as well as the ballot title Confirm polling location</p> <p>**State Filing Deadlines: <i>Oregon: 61 days prior to the election</i> <i>Washington: 46 days prior to the election</i></p>	<p>WHO: Community</p> <p>WHAT: Voter's pamphlet</p> <p>ACTIVITIES: Secure ballot arguments/ endorsements for voter's pamphlet</p>	<p>WHO: District</p> <p>WHAT: Get out the vote</p> <p>ACTIVITIES: Perform precinct walks, phone banking, absentee ballots, etc. Look for likely positive voters who have not yet voted during the mail-in ballot period*** ***In Oregon, ballots may be mailed no sooner than 20 days before the election date and no later than the 5th day before the election date</p> 	<p>WHO: District, Community & Architect</p> <p>WHAT: Election Night Poll Watch</p>	<p>WHO: Community</p> <p>WHAT: Victory rally!</p> <p>ACTIVITIES: Pick up campaign signs Send thank you gifts/letters Gather precinct results for analysis (start for next campaign strategy)</p>	<p>WHO: District & Architect</p> <p>WHAT: Inform the community</p> <p>ACTIVITIES: Distribute progress reports on projects Share post occupancy evaluations</p>

The purpose of **Funding Strategies** is to explore how school districts secure funding for projects. Please contact Mahlum for more information, or if your district would like to be featured.

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