## mahlum

## FUNDING STRATEGIES



## a 10-year retrospective

In this special issue of Funding Strategies, we look back at lessons learned over the past 10 years through conversations with school board members, administrators, communication specialists and other industry experts. As we reflect on highlights from the decade, we also look forward to the promise of new discoveries in our continued exploration of effective strategies for funding capital projects.



In 2000, Mahlum launched a new publication, Funding Strategies, aimed at consistently communicating with K-12 school districts in Washington and Oregon. The newsletter was conceived to explore how school districts secure funding for capital projects and share information on effective strategies.

Over the last decade the publication has featured diverse case studies, interviews, tips and hints, information on trends—and hopefully inspiration—for successful bond and levy elections. Amidst changing economic conditions and demographics, as well as new communication tools, many of these insights still resonate today and continue to offer guidance for capital funding campaigns.

In this new decade, we'll continue interviewing school districts in both states to understand how they approach passing bond and levy packages. We're looking forward to sharing more "lessons learned" and extending this dialogue with you through future issues of Funding Strategies.

# TOP 10 "LESSONS LEARNED" FROM 10 YEARS OF FUNDING STRATEGIES

What better way to assemble highlights from 10 years of case studies and best practices than a Top Ten list? The following themes have repeatedly proven to be critical factors to campaign success.



10

#### ONGOING EFFORT

A successful school bond campaign begins long before voters visit the polls. Continue the communication all year long—not just at election time.

#### FROM ISSUE 17:

"Always prepare for the next election – keep the campaign alive!"

Tim McGillivray, North Thurston Public Schools

#### ADVANCE PLANNING

Invest in a thorough, community-based planning process. Prepare a long-range facilities master plan to give credibility to your package outline in detail what is needed and how much money will be spent. Be very clear on what voters will get for their money and how much money it will cost taxpayers.

#### FROM ISSUE 18:

"Remember that you are better off having conversations with people that don't always end with the phrase, '...so give me your money...'"

Mark Wiener, Winning Mark

#### COMMUNITY INPUT

What the community thinks is very important. Do your homework before beginning a bond campaign. Survey your community, and pay attention to the results, then design a bond package that they will support because it reflects community input.

#### FROM ISSUE 8:

"School districts sometimes forget that if they are going to do something that impacts the whole community, they had better first check with the community. Unless you are small enough to ask everyone individually, a survey is the most cost effective approach."

Jeanne Magmer, C & M Communications

## CONSISTENT MESSAGES

Once you find your messages, keep them simple and stick to them. Choose your messages carefully and communicate them consistently. Explain issues in a way that is easy for people to understand—speak their language.

#### FROM ISSUE 20:

"Rather than use jargon such as 'ADA accessibility', campaign volunteers explained that "kids in wheelchairs find it hard to get into our schools. Using language people could easily understand was one key to the campaign's success in educating voters."

Nicole Kaufman, Hillsboro School District

## TARGET GROUPS

Target different groups of people with customized messages. Reach out with a diverse and inclusive effort to ethnic groups, faith-based communities, civic organizations, older voters without children in school, and other identifiable groups of people within your district.

#### FROM ISSUE 5:

"No one communication tool would have been enough to pass our finance measures. The key was to target different groups of people with appropriate messages and to communicate with them consistently."

Ann Oxrieder, Bellevue School District

#### THEN & NOW

#### U.S. Public Elementary/Secondary Education Statistics

Source: U.S. Department of Education Institute of Education Sciences (IES), http://nces.ed.gov/

	10 YEARS AGO	TODAY
STUDENT ENROLLMENT	47.2 million	49.8 million
FTE TEACHERS	2.9 million	3.3 million
STUDENT/TEACHER RATIO	16.0	15.2
TOTAL NATIONAL EXPENDITURE	\$389 billion	\$543 billion
AVG. EXPENDITURE PER STUDENT	\$7,898	\$10,844
HIGH SCHOOL GRADUATES	2.6 million	3.0 million

"Population increases and high enrollment rates continue to be reflected in more students in America's schools than ever before."

Back to School Statistics for 2009 IES National Center for Education Statistics

5—

#### MOBILIZE VOLUNTEERS

Engage as many people as you can in campaign activities. Organize parents, friends of schools, etc. to have substantial person-toperson contact. There is no form of political communication more powerful than a conversation in the local grocery store check-out line or over the fence with a neighbor.

#### FROM ISSUE 19:

"In the end, the bond and levy passed because the process and numbers were appropriate and because we had over 200 volunteers supporting the effort!"

Clif McKenzie, Bainbrindge Island School District

### USE TECHNOLOGY

Technology—which was emerging in 2000 campaigns—is now essential for effective campaigns. Use databases, email, websites, electronic newsletters, social media, and other forms of technology to augment traditional communication techniques.

#### FROM ISSUE 10:

"Utilizing the Internet as a tool for communication with voters is becoming a big issue. Of voters surveyed, 82% have some form of Internet access. Because parents increasingly want to receive information from school districts via the Internet, school districts need to continue to invest in developing better Internet communication strategies."

2003 Washington State Education Voter Survey

#### MEDIA COVERAGE

Media can play an inexpensive and important role in your success with voters. Talk with local newspapers, radio stations, and TV stations about running feature stories on schools. **Highlight innovative** programs, students and teachers who are excelling, and other positive messages to build trust.

#### FROM ISSUE 21:

"Whenever an important issue arose, we distributed a media message with key points of information. The newspapers, TV and radio stations would then call us and run timely stories with accurate information."

Dr. Phil Long, Medford School District

#### BUILD RELATIONSHIPS

Passing a bond request is more about relationships than it is about communication tools. Start early and focus on building long-term relationships with a broad spectrum of your community.

#### FROM ISSUE 16:

"You can't change someone's mind in a month or with a single mailer—you have to show them data, run into them at a meeting, and provide transparent information all year and every year."

Patricia Holmgren, Tacoma Public Schools

#### **KEEP PROMISES**

Do what you say you will do. Follow through with promises to voters—it will build trust for the next election.



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.

Seattle 206.441.4151 Portland 503.224.4032 mahlum.com info@mahlum.com

#### DISTRICT CASE STUDIES

The following is a list of case studies/ topics featured in our newsletter over the past 10 years:

#### OREGON CASE STUDIES

Beaverton School District Bend-La Pine School District Centennial School District Condon School District David Douglas School District Forest Grove School District Hillsboro School District Hood River County School District Lake Oswego School District Medford School District North Clackamas School District Phoenix-Talent Schools Redmond School District Riverdale School District Salem-Keizer Public Schools Seaside School District Sisters School District West Linn Wilsonville School District

#### WASHINGTON CASE STUDIES

Bainbridge Island School District
Bellevue School District
Central Kitsap School District
Clover Park School District
Edmonds School District
Issaquah School District
Lake Washington School District
Northshore School District
North Thurston Public Schools
Renton School District
Shoreline School District
Tacoma Public Schools
Yakima School District

SPECIAL TOPICS

10 Steps to Successful School
Finance Campaigns
Oregon School Boards Association

A Consultant's View C and M Consulting

**Campaign Insights**Mark Wiener, Winning Mark

#### Capital Projects Financing

Seattle-Northwest Securities Corporation

**Effective Polling for Powerful Campaigns**Grove Insight; Public Affairs Counsel

**Nailing Down Construction Costs**Rider Levett Bucknall; Skanska USA;
SpeeWest Construction

Navigating a Challenging Economy
Seattle-Northwest Securities Corporation

Sustainable Strategies for Schools / Focus on Grants for Going Green Blackbird Consulting; Oregon Department of Energy

Washington State Education Voters Survey Seattle-Northwest Securities Corporation

Please contact us at info@mahlum.com if you would like to receive previous issues of Funding Strategies.