
FOREWORD

Securing Financial Support for Local Schools is one of the booklets in AASB's Boardmanship Series. The series was conceived to provide school board members with additional information on specific issues related to education governance that are not addressed in detail in other AASB publications.

This booklet discusses various strategies and techniques which can be implemented by school boards to gain additional support for local schools. It is designed to give readers an overview of the elements of a successful referendum campaign. Yet each campaign, like each community, is different. A successful campaign effectively anticipates community needs and properly targets efforts to meet those needs. Therefore, this booklet is best viewed as a foundation on which other information is added.

INTRODUCTION

Securing support for public schools – whether it's increased financial backing or community involvement – is no simple feat. Both demographic and political trends challenge school boards seeking to bolster community support for schools and threaten their existing support.

Yet increasing community support for public schools, even securing tax increases, can be done. And, it doesn't take a lot of money. But, it does take a systematic, well-organized campaign and leadership by the local board of education.

The school board should be at the forefront of efforts to seek additional support for schools. This booklet is designed to help Alabama school boards understand the components of a successful referendum campaign as well as their role in the campaign. Although no two referenda campaigns are alike, the basic components of a successful campaign, including time lines, organization and strategy, are similar.

REFERENDA CAMPAIGNS

In today's society, the average American taxpayer relishes the opportunity to vote against any type of tax increase. Unfortunately, many crucial school finance referenda* fail to receive voter support due to an ineffective campaign organization or because the school system did not communicate its needs to local constituents.

Traditionally in political campaigns, candidates often are conceived, packaged and marketed to the general public with their test of acceptability being the final vote on election day. However, a school finance campaign is an ambiguous thing. It's neither fish nor fowl. It lacks the emotional appeal that a candidate automatically carries with an established voting record, a spouse, three children and a dog. Instead, a finance issue often is worded poorly on the ballot and written in such a way to cause maximum confusion. So, it's up to the referendum organizers to make the issue come alive, to prove the issue's importance, and to compel supporters to get out and vote.

There's no magic when it comes to running a referendum. It doesn't take a great deal of money to convince the voters to vote "YES." What it does take is:

- a 12-month public relations program;
- a well-organized campaign; and
- a tremendous amount of energy.

If your system has a good public relations program already in place, then your referendum will be much easier to pass. A year-round public relations program is vital to a successful campaign because the public supports issues it understands or thinks it understands. Without the understanding that a public relations program can generate, the school board does not get the backing it needs to provide solid education programs.

Testing The Climate

The school board must carefully assess the community's attitude toward the school system prior to a referendum. Local residents must believe that the board is operating in a business-like manner and is spending their tax

**Throughout the booklet, reference is made to "school finance referenda." The strategy for a finance referendum is the same as a referendum dealing with other issues. This basic referendum plan has been used successfully with numerous types of elections.*

dollars wisely. Voters must recognize that a sound instructional program is in place.

In order to test the “climate” before setting an election, an opinion survey concerning the public’s perception of the school system can be of great value. Surveys can be designed by the school system staff if the expertise is available, or they can be conducted by a professional outfit.

Whether you decide to conduct a formal survey or informally measure the public climate, your board should consider the following important questions before embarking on a campaign:

- Is the board unified?
- What is the community’s general attitude toward the school system?
- Does the internal staff understand the need for the referendum? Will it be supportive?
- What is the past history of referenda campaigns in the community?
- Will booster clubs, parent groups, etc., support the vote?
- What groups might oppose the tax?
- What is the pulse of the parochial and/or private school interest?
- Do the big taxpayers, opinion leaders and elected officials in the community understand the system’s needs?
- Can you expect local media support or at least fair coverage of the tax campaign?
- Is the chamber of commerce supportive of the schools? How active is its education committee?
- Does the school board generally have the support of business and labor?
- What side issues might influence the vote?
- What is the tax implication of the referendum? Is it a reasonable increase?

The board must consider any potential side issues since they also can affect a referendum campaign. Side issues are those that surface during a campaign and often are not related directly to the referendum but, nonetheless, cause controversy in the community. Examples of side issues that can surface include:

- Private schools vs. public schools (rich vs. poor);
- Polarization of white and black communities;
- Poor economy;
- Credibility of administration and school board;
- Consolidation/strong community ties to school(s) to be closed; and
- Recent property reassessment.

In one state, a survey showed that side issues surfaced in more than two-thirds of the campaigns that were defeated in a 13-year period. No side issues appeared in 77 percent of the campaigns that were successful.

Another important factor in a referendum campaign is the school board's level of support for the issue. Ideally, the school board unanimously should support the decision to call for a referendum. A board with divided support for the referendum can kill the vote because two different messages are going out into the community by voices that local residents consider to be credible. In the same survey cited earlier, roughly 70 percent of the referenda campaigns in which board support was split were defeated!

Setting The Stage

If local voters appear to support the referendum question and the board's commitment is strong, you should consider the next steps to set the stage for the referendum campaign.

Involve the Public. Consider appointing a "Blue Ribbon Task Force" to assess the system's needs and to make recommendations to the board. The task force should have all the facts, figures and studies it needs to substantiate the system's needs. It should encompass a broad representation from the community, including those who can play the "devil's advocate" and discuss possible negative issues affecting the proposed plan. Be sure to involve school employees (at all levels) as well. They will be able to identify specific uses for the additional revenues. Employees need to feel "ownership" toward the building program. In addition, the media and public should be notified of scheduled task force meetings.

Once the task force has completed work, its recommendations, along with the results of the public opinion survey and any information important to the passage of the issue, should be shared with the board. For the sake of credibility, the board should not take the task force's recommendations lightly. If the board fails to follow its advice, explain to the task force why you were unable to accept its recommendation.

Explore Legal Issues. Contact the board's attorney to discuss the necessary legal requirements for a referendum and work with your attorney and local officials in setting a date for the election. You must consider every possible element that might negatively affect the campaign. Certainly no election concerning a tax increase should be held on April 15 (federal income tax deadline) or a date just after property taxes are mailed.

Likewise, it's not advisable to schedule a referendum the same day school board elections are held. Candidates might use the referendum as a side issue to get elected. Not only could the referendum be defeated, but new board members may be elected who ran on an "anti" vote.

Announce the Referendum. Plan carefully the board meeting to discuss the referendum resolution. Some voters make a decision on their vote after reading the first announcement. The school system's needs should be discussed frankly during this session, but the information should be kept child-centered. Stress what the proposal means instructionally for children. Provide the tax information voters want to hear. Obtain the best estimates available on what the tax increase means to local residents. (Break the increase down on a yearly and daily basis for a \$50,000 and \$100,000 home). But, above all, keep the message simple – do not use education jargon. The voters must thoroughly understand the purpose of the vote.

THE CAMPAIGN: ANALYZING

The most successful campaigns are thoroughly organized. At least 90 days prior to the vote is needed to organize a campaign to allow adequate time for analyzing, planning and communicating. These phases – plus evaluating your efforts after the campaign – are the four steps of a first-rate campaign effort.

Because every community is unique, so is every campaign strategy. Careful study of your community's characteristics is the first step in developing a campaign strategy. Among the community attributes you should assess while developing a campaign strategy are the:

- Education level of adults;
- Per capita income of local residents;
- Racial enrollment of the school system;
- Racial breakdown of voters;
- Side issues;
- Possible opposition; and
- Senior citizen population.

All of these factors affect the strategy for the campaign and, ultimately, the vote.

This analysis is helpful in identifying groups of people who are likely to support the referendum, which is an important element of your campaign strategy. Voters who generally support referenda include:

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- Individuals who are well educated;
 - Business and professional people;
 - Individuals with higher incomes;
 - Parents of school-age children;
 - Women; and
 - Non-white voters.

The greatest percentage of “YES” voters is among school system employees and their families. However, many employees are not registered and do not vote.

Identifying Supporters

The purpose of the campaign is to provide the public with the necessary information to make a wise decision. But providing information is not enough. Referendum supporters or the “YES” vote must be identified and reminded frequently to vote. This is not an easy task. Throughout the campaign, your strategy should focus on meeting the informational needs of “YES” voters and getting them to the polls.

Many referenda have been defeated because the “YES” vote was not properly identified and reminded to vote. “YES” vote identification is the one single factor that can help win an election. A survey of 42 referenda campaigns showed that 84 percent of the successful campaigns used “YES” vote identification techniques. In 75 percent of these systems, “YES” voters were called the night before the election and the day of the vote.*

When your budget, time and volunteer force are limited, do not exert effort trying to convert a “NO” voter. Instead, identify the “YES” voter and work on those undecided voters.

THE CAMPAIGN: PLANNING

Establishing a campaign organization is the next step in planning for the referendum. First, the school board needs to name a steering committee that will be responsible for developing the campaign strategy, time line and promotional materials. Since the referendum must have a broad base of support and cannot be perceived as “the board’s” or the “administration’s” referendum, a steering committee comprised of community leaders as well as system personnel is a must. Representation on the steering committee also should include board members, teachers, principals, and business and community leaders. Be sensitive to the demographics of the community and make sure representation from various minorities is included as well.

**Based on a survey of South Carolina school systems.*

Steering Committee

The steering committee should be small, so decision making is not a problem. Normally 15 to 20 people serve on the committee, but hundreds of people can be involved in the campaign by using subcommittees operating under the steering committee. Each subcommittee chairman automatically serves on the steering committee. The following are some subcommittees you should consider using:

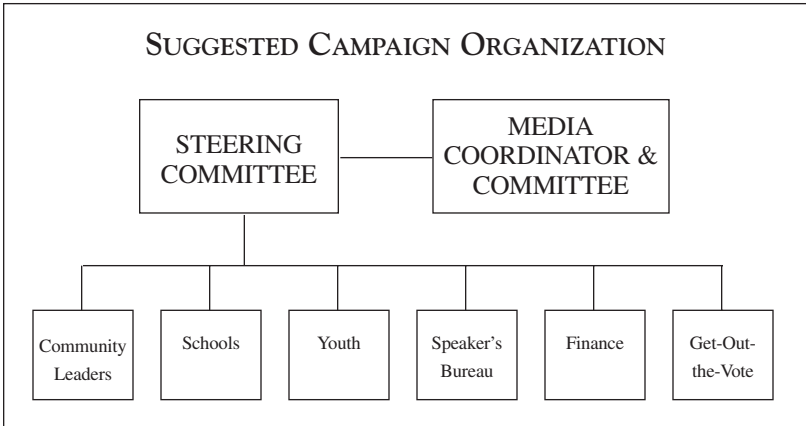
- Finance
- Media
- Speaker's Bureau
- Community Leaders
- Youth
- Get-Out-The-Vote
- Schools

A highly organized individual should be selected to coordinate the steering committee's efforts and to oversee the subcommittees' activities. Selecting the steering committee chairman is one of the most important responsibilities the board has in the campaign. A great deal of thought and input from others needs to go into this decision. The steering committee chairman should be an individual that commands respect in your community and is well-known for good judgment and thoughtful decisions. This person could be a school board member, business leader or local pastor. The "right" person to lead the referendum effort will be the individual who has time to donate, who is a stickler for details and who is highly organized.

The school board president and superintendent should contact the individual just as soon as the announcement is made to pursue a referendum since the chairman of the steering committee needs to have input in the selection of the subcommittee chairmen.

Selecting the various subcommittee chairmen also is a critical task. Seek advice from board members and administrators concerning these various assignments. This is a political campaign. Selection of the key steering committee leaders needs to be based on expertise, not on friendship. For example, the chairman of the "Get-Out-The-Vote" committee must be someone who has expertise in politics and precinct organization. This is not the opportunity to appoint a friend who wants "to learn" how to run a political campaign. The novice certainly can be used, but in a supporting role.

The steering committee needs to keep in close contact with the school board to keep members abreast of campaign activities. The board is represented with members on the steering committee, but steering committee members should be made aware they aren't policy makers. They only are responsible for developing and directing activities to help pass the referendum.



Subcommittees

The steering committee will be most effective if it divides its responsibilities among its various subcommittees and personnel. The following breakdown of responsibilities is a model of what has been used successfully by school systems. However, if your school system is small, consider consolidating some of the committees.

Media Coordinator/Committee. The media coordinator is a key individual in the campaign organization. This person must be skilled in the field of communications. The responsibilities of this person and the media committee include the following:

- Writing and developing the overall advertising/promotional campaign. (Input, of course, is requested from others.)
- Writing and designing brochures, fliers, news releases, presentations, billboards and advertisements, etc.

The media committee and the steering committee work together. The media coordinator and the steering committee chairman should be aware of all aspects of the campaign. Any problems need to be communicated to both as soon as they surface.

Community Leaders Committee. This committee should consist of two individuals from each community in the system, and the chairman should be someone who is well-known and well-respected. Consideration also needs to be given to racial balance. The responsibilities of the community leaders committee include the following:

- Assisting in the scheduling of speaking engagements in their specific areas.

- Accompanying speakers when presentations are scheduled in their areas.

- Working individually with local citizens.
- Assisting with the “Get-Out-The-Vote” drive.

Schools Committee. The chairman of this group should be a strong administrator, and committee membership should include representatives of each school in the system. Each school will establish an individual referendum committee, which is chaired by the school principal, to pursue campaign activities. The committee coordinates individual school activities. The responsibilities of this group also involve coordinating and guiding activities planned by the various schools, including student activities, open houses, etc.

Youth Committee. This committee coordinates the systemwide effort of all secondary students. Committee membership consists of the student council presidents, senior class presidents and high school newspaper editors. The chairman of this committee generally is a secondary principal. Among the responsibilities of this committee are the following:

- Participating in Media Day (at least newspaper editors if not the total group).
- Working with the media committee to distribute promotional materials and record radio spots, etc.
- Working closely with the “Get-Out-The-Vote” drive in order to register all 18-year-olds to vote.
- Assisting the schools committee with its activities.

The list could go on. This group will be highly enthusiastic, so keep it busy.

Speaker’s Bureau. This is a very important committee. The responsibilities of the speaker’s bureau include training and scheduling all speakers and making presentations to clubs and organizations, etc. As the campaign progresses, a continuous evaluation needs to be made of scheduled speaking engagements. If the audio-visual presentation has not been scheduled in a community, then contact needs to be made with community leaders to see that the presentation is scheduled.

All audio-visual equipment needed for the speaker’s bureau should be housed in close proximity to the committee chairman. The committee chairman or a designated member should have the responsibility of keeping track of all audio-visual equipment. Every effort must be made to ensure that a complete working set of equipment goes with each speaker. (Nothing is more frustrating than to start to make a presentation and find

that your equipment does not work properly.)

The chairman also is responsible for notifying the local principal and a community leader when a presentation is scheduled in that community. One or preferably both of these individuals need to accompany the speaker to the engagement.

Finance Committee. The finance committee works with the steering committee to develop fund-raising activities. Promotional costs of the campaign probably should be paid for with donated funds even though an attorney general's opinion states unrestricted public funds and public property may be used to promote ballot initiatives provided the school board determines the initiative furthers the school system's purpose and mission or serves a public purpose. Use of public funds to support a tax increase could become an issue in the campaign. Thus, the finance committee needs ample time to establish a goal and solicit funds prior to the start of the promotional campaign. The committee also is responsible for maintaining and filing all financial and other records required by law. (*See Fund Raising.*)

Get-Out-The-Vote Committee. The chairman of this committee needs to be someone who is politically active and has experience in getting voters to the polls. This is no position for a novice! Chairing this committee takes a great deal of time and effort. Whoever is selected must have the time to donate. All committee members need to be highly skilled in precinct organization.

Many functions fall under this group, which might mean the formation of several subcommittees, and literally hundreds of people can be utilized as volunteers. Remember, the more people you involve in a well-organized campaign, the more folks you have committed to the passage of your referendum. The responsibilities of this committee include:

- Registering Voters – particularly 18-year-olds, newcomers to the community and potential supporters who are not registered.
- Distributing Absentee Ballots – particularly to college-age students.
- Telephoning and E-mailing Supporters – a technique used frequently during the campaign, especially during the last days of the effort.

Fund Raising

Another critical responsibility of the steering committee is fund raising. Sufficient funds must be raised to carry the school system's message to the public. School facilities and equipment can be used in specific campaign promotions, though it is best to use donated monies for most promotional activities to avoid side issues that can develop from this type of expendi-

ture and adversely affect the vote. Boards can take side on an issue of importance to public education — but not political candidates — provided the board determines there is a public purpose to be gained. The state attorney general has issued an opinion stating local boards of education can use public money to promote ballot referendum issues in a way that provides voters with information about how the issue will affect the public school system.

Money is needed to run a campaign – regardless of what type campaign is planned. The budgets for the various subcommittees are set following the development of the campaign time line and scheduled activities. The finance committee’s fund-raising goal initially should be based on the activities included in the plan.

Fund-raising activities should be kept as low key as possible, so they will not draw out the negative vote. It is also important to receive money early in the campaign to facilitate better planning.

In addition, local boards that receive contributions and/or plan expenditures to promote or defeat a proposition are **not** subject to the state Fair Campaign Practices Act’s reporting requirements, according to a state attorney general’s opinion. As public entities, however, boards must allow public inspection of records related to funds they spend on ballot propositions.

Time Line

Important to every political campaign is a time line. The time line includes activities that must be accomplished for a successful referendum. The time line is a calendar of activities going backward from election day to the day of the first campaign steering committee meeting.

A well-planned time line directs strategy every step of the way and puts the campaign in an offensive rather than defensive posture. If the time line is established, it is difficult for the opposition to distract the steering committee’s efforts. Activities on the time line must be developed and scheduled, so the most enthusiasm and support for the referendum is generated the day of the vote. Voter support should not peak a week early or a week late.

In writing the time line, keep in mind the various activities needed to promote the referendum. In political campaigns, establishing name recognition for a candidate is crucial. In a referendum seeking a tax increase, name recognition already is established, so a promotional effort three months in advance would not be appropriate because the advance notice would give the opposition ample time to organize.

A sample time line is featured on the following pages.

SAMPLE TIME LINE

The following is a generic time line that may be useful as a guide. Some of the promotional activities may not be appropriate because each community is different. You should review carefully the demographics of the school system prior to writing the plan and time line.

Three Months Prior to Election:

- All committees draft and submit a campaign budget to the finance committee.
- Finance committee begins raising the funds necessary to defray the cost of the referendum and keeps records.
- Media committee has close to completion the slogan and other copy, logo and additional artwork, audio-visual presentation, etc., for the production of all promotional items.
- Community leaders quietly begin contacting prominent leaders in the community, opinion makers and local politicians to seek their support. They also assist in scheduling audio-visual presentations in their various communities. (Schedule the presentations no earlier than five weeks before the vote with maximum exposure the week prior to the vote.)
- Explanation of the plans for the additional funds, what it will mean to children, etc., is provided to the professional and support staff. (Ideally, these groups already have had an opportunity to be involved in the referendum.)
- Each school's referendum committee develops its plan to promote the referendum.
- The "Get-Out-The-Vote" committee begins organizing at the precinct level. Voter registration sheets need to be ordered. The telephone survey is developed. Phone numbers are plugged into the voter registration sheets. Volunteers are recruited.
- Voter registration is under way.

Two Months Prior to Election:

- The steering committee approves all campaign promotional items. The items are in the process of being produced.
- Copies of the audio-visual presentation are ready for showing and speakers receive appropriate training.
- Phone numbers continue to be plugged into voter registration sheets. (This is a time-consuming effort.)
- The finance committee completes the fund-raising drive.

Five Weeks Prior to Election:

- Audio-visual presentations begin in the community. Schedule maximum exposure during the last two weeks of the campaign.
- Media Day is held for local media, high school newspaper editors and local college newspaper editors, etc.

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- Specific assignments are made and training begins for those persons involved in the “Get-Out-the-Vote” Drive.
 - The media plan is finalized and an accurate timetable established concerning the dissemination of appropriate promotional items (bumper stickers, campaign buttons, fliers, yard signs, etc.).
 - Revise paid media schedule in terms of the funds raised.

Four Weeks Prior to Election:

- Media committee contacts local businesses and asks if changeable copy signs can be used the week prior to the election. The signs carry the referendum slogan, etc.
- Advertisers in local papers are contacted and asked if a copy of the referendum logo can be dropped into their existing advertising copy the week prior to the election. Permission must be received from the newspaper prior to contacting advertisers. (Get signed permission slips from each advertiser before you insert logo.)
- Radio spots are written and recorded but are not aired until three or four days prior to campaign unless there is strong opposition.
- Newspaper ads are designed and placement schedule is discussed with appropriate papers.

Three Weeks Prior to Election:

- Breakfast for “opinion leaders” is held at all schools in the system (audio-visual presentation is shown).
- Schedule meetings with editorial boards and TV news editors to seek their support of the referendum.
- A meeting is scheduled with the area ministerial association.

Two Weeks Prior to Election:

- Begin your telephone survey. The survey must be completed during this week. (Make sure your callers have been thoroughly trained.)
- Direct mailing is sent to all ministers in the area with a bulletin insert attached to the letter. Ministers are requested to print the bulletin insert in the church program.
- Sample ballots are distributed to appropriate groups.
- The results from the survey are being typed up precinct by precinct.
- Ask supporters to post “YES” vote blurbs on their Web sites and to send the blurbs to constituents via printed or electronic newsletters.

One Week Prior to Election:

- Campaign buttons can be worn.
- Billboards can be posted (weigh carefully if you want to post boards).
- Changeable copy signs are up.
- Posters in stores are on display.
- Yard signs are up.

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- Undecided voters get a special mailing signed by an opinion leader in their community.
 - Telephone survey is complete. The “YES” vote has been determined in each precinct.
 - Radio spots can begin (frequency will build and peak on day of the election).
 - Action alerts soliciting support can be e-mailed.
 - Telephone banks are established.
 - Transportation system is organized.
 - Precinct workers are trained.

One Day Prior to Election:

- Telephone calls are made and e-mails are sent to all identified “YES” voters urging them to vote. Transportation services, etc., are offered and times for pick-up are scheduled.

Day of the Vote:

- Get-Out-The-Vote drive is in full swing.
- Reminder e-mails are sent and telephone calls are made.

THE CAMPAIGN: COMMUNICATING

Planning and developing the public information campaign is one of the most important tasks of the campaign. It is important to deal honestly and factually with the public at all times throughout the campaign. If you don't, it will come back to haunt you! Don't predict what might occur if the referendum is defeated unless these events are certain to happen. For example, if you say the system would lose accreditation due to poor facilities if the vote is defeated, the board's credibility is at stake if the vote is defeated and accreditation remains intact. The board would have a difficult time attempting a successful vote the second time around.

The board's first announcement explaining the referendum is very important. Some voters decide how they plan to vote after they read the initial announcement. Give careful thought to the way the board meeting is planned and the way a follow-up news release of the board's action is written. Ample time needs to be given to board members' discussion of the referendum. A thorough explanation of the rationale behind the referendum needs to be made to the media.

In all communications, especially the follow-up news release, it is important to keep the message simple and free of “educationese.” It also is important to personalize the message and explain what the referendum means instructionally to children. Writing simply is difficult for many educators, but it is mandatory in a referendum. Consider the average education

level in your community and education's special language. One superintendent explained to voters that the board was scheduling a referendum to build a "media" center and a "multi-purpose" facility. How many residents would know these new additions, in reality, are a library and a gym?

For the purpose of this booklet, the public information campaign is divided into two categories: free media and paid media. Free media includes the media coverage a system gets through news releases and media events. Paid media consists of any paid promotional item or materials a system may decide to use to promote a campaign.

Free Media

Most referenda campaigns receive a great deal of attention, but this attention should be managed carefully. It would not be advantageous to send news releases, give talk show interviews and send letters to the editor months in advance of election day. You should keep the campaign low key for as long as possible. Yet, there is plenty to do early in the campaign. Work overtime making one-on-one contact, speaking to groups supportive of the vote and organizing and identifying your "YES" vote at the precinct level. But, don't plan a campaign blitz a month or two before the election. Keeping the campaign low key does not mean withholding information from the media, but it does affect the crucial timing of your public information campaign.

Free media is extremely helpful to your strategy, but don't rely on the media to carry the campaign message. One-on-one personal contact often spells a successful vote. So what does this mean? It means that the smaller systems, often rural, must depend on word-of-mouth, hard work and enthusiasm to turn out their voters. Large systems sometimes have a difficult time personalizing their message. In large systems, it's harder to organize at the precinct level and the campaign tends to use mass media techniques. Often the one-on-one contact is missing and so is much of the enthusiasm.

Listed here are some free media ideas:

Media Day. Schedule a Media Day three or four weeks prior to the vote. Invite all media representatives in the area as well as the editors of high school and college area newspapers. Begin the Media Day with a brief overview of the purpose of the referendum and be prepared to answer any questions pertinent to the campaign. Take the group on a tour of the schools, showing them some of the system's needs. If opposition to the campaign surfaces, the media already have seen the system's needs and

will not be distracted by misinformation the opposition might generate.

Letters to the Editor. Weigh carefully whether to initiate an extensive letter-to-the-editor campaign if opposition hasn't surfaced. An extensive letter-writing campaign might backfire and cause a flood of opposing letters. But, be prepared and have letters ready to be mailed or hand delivered if the opposition wages a negative letter-writing campaign. Visible support from well-respected people in the community can sway an undecided voter. Some volunteers may write their letters; others may feel more comfortable if a member of the steering committee writes the letter for them to sign. Recruiting writers is acceptable in an organized letter-writing campaign.

Editorials. A positive editorial from the local newspaper, television station and radio station certainly can be important. Make sure good relations with the media are maintained throughout the campaign. Adhere to the media's deadlines and answer questions as accurately and promptly as possible. Good media relations hopefully will pay off with an editorial supporting the referendum.

Talk Shows. Consider carefully whether to actively solicit talk show appearances. Participate in a talk show if you are invited, but make sure your host is neutral. Campaign supporters should be encouraged to phone in or be in the audience to offer supportive comments.

Web sites and E-mail. Give supporters brief, persuasive "YES" vote blurbs to post prominently on their Web sites or to send to their constituents in regular electronic and/or print newsletters, magazines or other publications. Create an e-mail database of referendum supporters and send updates, calls to action and alerts in accordance with your promotion time line. Carefully weigh the use of a referendum Web site or blog since the media and opposition often use these for information. Search the Internet for blog and e-magazine "reports" on the referendum, considering whether there is any benefit to posting favorable comments about the referendum or responding to negative posts. Many blog sites aren't credible news sources and instead offer opinion, although some (particularly those linked to major media outlets) have large readerships.

Paid Media

Planning is crucial to the paid media campaign. The budget for paid media should be set and the finance committee's goal should be based on the activities in the campaign plan ... not vice versa. Each promotional item used in the campaign should be evaluated in terms of its cost and how effec-

tive it will be in obtaining positive voter support. Always consider the composition of your voters and what will motivate them to vote positively. A campaign logo or slogan needs to be developed prior to preparing promotional materials. The slogan should be child-centered. The logo should be used on all promotional items to reinforce the campaign's message. All public information activities are a strategic part of the time line leading to the campaign's peak on election day.

Listed here are some promotional or paid media items to consider.

Audio-Visual Presentations. Developing an audio-visual presentation (10-15 minutes maximum) is a must. Such a presentation allows a pictorial message of the system's needs to be taken to various groups and organizations. Remember, many adults haven't been in the schools in years and aren't aware of conditions and needs. Make multiple copies of the presentation, so the community can be saturated without logistical problems.

Brochures. An informational brochure – in both printed and electronic formats – is needed to distribute at various gatherings. The brochure doesn't have to be fancy, but it should contain basic information concerning the referendum.

Newspaper Ads. If newspaper ads are used, design the ads carefully. Consider the emotional appeal the ad carries to the local voter. Don't fill the ad with charts, graphs or detailed tax information. An ad with a lot of white space, a picture of a student and limited copy can be effective. Also consider using an ad that carries a brief amount of copy and literally hundreds of local supporters' names in the last issue of the newspaper before the vote. (Remember, keep the campaign low-key. Don't run the newspaper ads until the very end of the campaign).

Radio Spots. Weigh carefully whether to run radio spots. If strong opposition hasn't surfaced, the spots may serve as a reminder to the "NO" voter to get out and vote. If the decision is made to use radio, remember to use spots close to the date of the campaign and to select stations that appeal to the groups who are supportive. Also, be sure and designate when the spots are to be played. Ask for prime listenership time, not the spot immediately before the national anthem at midnight.

Sample Ballots. Fliers carrying the wording of the ballot are a must. Most ballots are full of legalese and confusing to read. Make sure local residents understand the wording of the question and the appropriate way to mark the ballot.

Direct Mail. Direct mail frequently is used in traditional political cam-

paings. Referenda campaigns are no different. Design direct mail materials to appeal to the “YES” vote. Never mail “get-out-the-vote” materials to voters determined to be negative to the issue. When designing direct mail materials, keep the targeted group in mind. If writing realtors, the copy should cover their concerns. If writing “moms,” address their major interests.

When developing the direct mail campaign, the mailing list used is very important. Usually, a computer disc containing the names and other pertinent information on registered voters can be obtained or purchased. The computer disc is invaluable in targeting voters. For example, women, especially of child-bearing age, support public school referenda. If the disc is available, it will include the names and addresses of all women between the ages of 19 and 40, so a special message can be prepared to send exclusively to them. This type of targeting can be used for minorities and other special groups.

Direct mail also can be useful as the “UNDECIDED” vote is identified. A postcard mailed to each undecided voter toward the end of the campaign and signed by someone they like and respect can have an impact.

Speaker’s Bureau. The speaker’s bureau is one of the most important public information activities of the campaign. Whether speaking opportunities are actively sought, expect requests for public discussions of the referendum. Many civic, social, employee and religious groups sponsor voter-awareness projects, so have speakers and materials ready. Be sure and target speaking engagements to groups who are supportive. Don’t solicit speaking engagements from groups who are negative. Also, give serious consideration to including an audio-visual presentation as part of the program. An audio-visual presentation allows speakers visually to take the campaign message to the public. In some cases, fact sheets, brochures and newspaper articles leave the voter cold. A visual presentation depicting the system’s needs can make the issue come alive.

Outlined here are some tips for organizing a speaker’s bureau:

- Train speakers, and ask them to memorize key messages.
- Send speakers in pairs, at least.
- Make sure enough copies of the presentation are available to saturate the area: One copy won’t be enough.
- Make sure the equipment operates.
- Develop a speaker’s manual.
- Ask speakers not to give information if they are unsure of its accuracy. Instead, they should offer to get the correct information to the individual requesting it.

- Debrief each speaker after each session. This information is helpful in spotting rumors, trends and pockets of opposition.

- Make sure all areas are saturated where there is “YES” voter strength.

Public Forums. Weigh carefully the decision to participate in a public meeting you don’t sponsor. Make sure you have control of the meeting, and don’t leave anything to chance. Large gatherings can backfire, resulting in negative publicity which can hurt the referendum. In planning public forums, remember to make sure:

- The moderator is neutral.

- The format is acceptable.

- Supporters turn out in force.

- Important questions are assigned to be asked.

- One microphone is designated for members of the audience to use to ask questions; and

- All individuals in the audience asking questions identify themselves. (Hostile members of an audience are less likely to vent their anger if removed from their colleagues and made to give their names.)

THE CAMPAIGN: GETTING OUT THE VOTE

The goal of the entire campaign is to turn out the “YES” vote on election day and win the referendum. Everything in the campaign is done with the hopes of aggressively identifying and targeting the “YES” vote while keeping the campaign low key to prevent agitating the “NO” vote.

Voter Registration

Voter registration is an important factor in the campaign. Your supporters must be registered to vote. Voter registration efforts not only must focus on parents, but also on other “friends” of the schools. The percentage of voters who are parents of children in school generally is quite small in most systems. Concentrate voter registration efforts in precincts where the “YES” vote is predominate. Don’t spend time in precincts where you have little or no support.

Alabama voters must register 10 days prior to election day. A voter registration drive must be well-organized before the 10-day limit. The registration drive should concentrate on those groups who are likely to support the referendum or who might not be registered, including:

-
- 18-year-olds;
 - School system parents;
 - Newcomers to the area;
 - Parents of preschoolers;
 - Minorities;
 - Well-educated/professional individuals; and
 - Employees.

“YES” Vote Identification

The common theme running throughout a referendum campaign is “YES” vote identification. All promotions are geared toward the “YES” vote. The “get-out-the-vote” drive is designed to get the “YES” vote to the polls. But just exactly who is the “YES” vote?

In small, rural communities, voter registration sheets can be scanned, contact can be made personally or by phone to identify supportive voters, and a “YES” list can be developed. In larger school systems, it is more difficult to identify the “YES” vote, and more sophisticated techniques such as polling are necessary.

The following are a variety of ways to identify the “YES” vote.

Telephone Surveys. The survey needs to be done by precinct, so areas of support and resistance can be seen. After each call, the surveyor notes whether the voter is a “YES,” “NO” or “UNDECIDED” voter. All “YES” names are turned in to a central location, and a “YES” list is developed by precinct.

Important to any telephone survey is a good instrument. Make sure the survey questions are worded simply and easily understood. (*See Sample Telephone Survey.*) The survey callers must be well-trained and diplomatic. The telephone is no place to put “hot-heads.”

Some school systems use volunteer help and school personnel (after hours) to conduct their surveys. This method is fine if the volunteers realize the extreme importance of their role. The referendum can be defeated easily if the telephone banks aren’t well-organized and if there isn’t a sense of commitment from the volunteers. Many communities employ professional surveyors who easily can handle this chore.

Door-to-Door Canvassing. Personal contact with a prospective voter can be one of the most effective campaign techniques for identifying the “YES” vote. Be sure to develop a door-to-door canvassing plan around key precincts where there is strong support. Don’t spend time in a precinct where there isn’t a strong positive vote.

SAMPLE TELEPHONE SURVEY

Hello ... I am _____, a volunteer working with the _____ school system. Due to overcrowded schools, our school board has found it necessary to take to the public on Sept. 24th a proposal to build \$10 million worth of new schools by raising property taxes in the county by seven mills. In order to meet our building needs, we must have the public's backing. May we count on your support?

___ YES ___ NO

If The Answer Is Yes:

Callers are instructed to thank voter for his/her support. Then continue by saying:

1. Do you know at this time if you will need transportation to the polls on Sept. 24th?

If the answer is YES: Take down their name, telephone number, address and e-mail address. Also ask what would be the best time to pick them up.

2. Would you like to be involved in the campaign?

If they say "YES" ... then put them to work.

If They Are Undecided:

Ask them if they would like additional information. If they say "YES," send them a brochure and get one of the community leaders in their area to follow-up with a personal note ... visit, etc.

The undecided vote is very important. Many elections are won and lost by the way this group votes. GIVE THEM AS MUCH ATTENTION AS POSSIBLE. Before the day of the election, you'll need to get back in touch with them to see if they are supporters. If they decide to vote "YES," then make sure they are on your "YES" list.

If They Say No:

Thank them for their time. Go no further with questions.

Organizing the door-to-door canvass campaign is important. For the purpose of canvassing, obtain a list of all registered voters in key precincts by address, not alphabetically by names. This way, a list is available showing every registered voter on a street listed in sequence by street number. This is ideal for door-to-door work.

Make sure a card is prepared with the name of each registered voter contacted and note whether they are "YES," "NO" or "UNDECIDED." Once again, turn the "YES" names in to a central location, so a master list of "YES" voters, precinct by precinct, can be developed.

Election Day

The importance of targeting precincts and identifying the “YES” vote can’t be stressed enough. It can make the difference between winning and losing.

What must be done to entice the “YES” vote to the polls on election day? Hopefully, the steering committee’s hard work will pay off the final week of the campaign. Speakers are making presentations to targeted groups, the school family and parents are ready to vote and reminders to go to the polls are mailed and e-mailed to supporters.

Telephone and e-mail banks are particularly useful in the last days of the campaign. The bank can be manned by volunteers or by professionals and organized on the precinct level. Volunteers phone or e-mail only the identified “YES” voters the night before the election to remind them to vote. On the actual day of the vote, the callers phone supporters periodically throughout the day and again, encourage them to vote.

Poll watching is an important aspect of an election. Poll watchers are assigned to each precinct, so they can quietly monitor voting activities. Each poll watcher is given a list of “YES” voters, and as voters arrive, they check the names of supporters off their list. At various times during the day, a runner contacts each precinct and gets the list of those individuals who have not voted. The runner gives the list to the telephone banks for follow-up phone calls.

The information helps election headquarters keep aware of the voter turnout at each precinct, so they can see if their key precincts are voting heavily. If a “YES” voter has not voted, he may get two or three calls on election day.

Poll watchers begin their duties when the polls open, and several poll watchers should be assigned to each precinct in order to stagger schedules. At the end of the voting day, poll watchers should remain at the precinct until the votes are counted and call in the results to a central location.

TIPS FOR A SUCCESSFUL REFERENDUM

- Communicate – all year long – not just at election time.
- Avoid split board decisions at all costs.
- Involve citizens. The more parents and citizens who work on the campaign the better.
- Analyze the political climate of your community.
- Involve your principals.
- Ignore the “NO” votes.
- Inform your staff first.
- Run your campaign like a political election.
- Explain funding ... and do it simply and briefly.
- Keep all materials child-centered – don’t use jargon.
- Remember, an election lasts only one day ... on that day the appeal has to be brighter, bigger and better than any other time during the campaign.
- Check everything twice.

There is no magic formula – what works in your community is what is best for you.

APPENDIX

Referendum Checklist

When developing a campaign strategy, you should anticipate, assess and plan activities as far in advance as possible. Here are some questions to get you started:

- General Overview**
 - Who supported you the last time you went to the polls?
 - Why?
 - Where are these people now?
 - How do they feel about the current issue?
 - Do you anticipate any problems which might affect the vote even though they are not related to the issue?
 - How can you eliminate or minimize these problems?
- Opposition**
 - Have you had organized opposition in the past?
 - Where can you expect opposition in this campaign?
 - What will these people be opposed to?
 - How will you counter opposition if it appears?
- Promotional Items**
 - Has a budget been developed?
 - What promotional items will be used?
 - Will the items target the “YES” vote?
 - Who will develop and distribute these items?
 - Have you discussed the positive or negative impact of these items?
- Media**
 - Will you have a Media Day?
 - Are you planning to use news releases in the campaign?
 - Do you plan an organized letter-to-the-editor campaign?
 - What Internet-based resources will you use?
- Fund-Raising Efforts**
 - Has a budget been presented to the fund-raising committee?
 - How much?
 - Is it realistic?
 - Is the fund-raising effort under way?
 - Will any public money and equipment be used?
 - Who is involved?

-
- What groups or individuals should be contacted?
 - Do you plan any special fund-raising activities?
 - Employee Relations**
 - How will you get the campaign message to the staff?
 - Who will encourage staff members to register to vote?
 - How will staff be involved?
 - Students**
 - Will students be involved in the campaign after school?
 - Are the responsibilities appropriate for the age group?
 - Do you think using students could create a possible side issue?
 - Have you stressed to the students the need for diplomacy when dealing with the public?
 - Who will coordinate the activities of the students?
 - Speaker's Bureau**
 - Do you plan on using an audio-visual presentation as part of your Speaker's Bureau?
 - How many copies will you need?
 - Have the presentations been scheduled?
 - Have the speakers been recruited?
 - Will the speakers be trained and given the key messages?
 - Will there be a speaker's manual?
 - Has a "typical" program agenda been prepared?
 - Opinion Leaders**
 - Will you invite all elected officials on a tour of the schools?
 - Have you made personal contact with opinion leaders in the community seeking their support?
 - Will you visit newspaper editorial boards and TV news editors?
 - Get-Out-The-Vote**
 - Do you plan an organized voter registration drive?
 - Do you plan to aggressively recruit absentee voters?
 - Are you organizing a get-out-the-vote drive at the precinct level?
 - Do you plan to target key demographic groups through direct mailings?
 - Do you plan to do a telephone survey and/or a door-to-door canvass?
 - Will you train workers?
 - Will you compile a "YES" list for each precinct?
-

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- Are you calling and e-mailing all “YES” voters the night before the campaign?
 - Will you offer transportation?
- Election Day**
- Are any events likely to occur on this date which will affect voters?
 - Will you use poll watchers?
 - Will they be trained?
 - Have “runners” been assigned to each poll to pick up the “YES” lists?
 - Are telephone banks in place to make reminder calls?
 - Can you provide transportation?
- Conclusion**
- Who is in charge of the victory party?
 - Have thank-you notes been written?
 - Have all promotional materials been taken down?
 - Evaluate the pros and cons of the campaign for future use.

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ALABAMA ASSOCIATION OF SCHOOL BOARDS

The Alabama Association of School Boards is the official voice of the state's local school boards and other boards governing K-12 education agencies. AASB is dedicated to improving educational opportunities for all Alabama public school students through the improvement of local lay management of public schools. By pooling resources through its membership, AASB provides a wide range of services to local school boards which one school board could not provide economically.

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