

PROPOSAL TO PROVIDE
COMMUNITY ENGAGEMENT SERVICES



JANUARY 7, 2022



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Dr. Don Angelaccio
Superintendent
Prospect Heights School District 23
700 N. Scheonbeck Rd.
Prospect Heights, IL 60070



January 7, 2022

**Proposal to
Provide
Community
Engagement
Services**

Dear Dr. Angelaccio:

It is with great pleasure that Beyond Your Base (BYB) and Managing Your Business (MYB) submit our qualifications to assist Prospect Heights School District 23 in developing and implementing a comprehensive community engagement program to inform district taxpayers and gather their thoughts and recommendations specific to a possible funding proposal to address capital and program improvements.

Our team is committed to developing funding proposals that are community-driven, which is accomplished by going *beyond your base* to involve all stakeholders in the planning process. Our approach is focused on precisely determining what taxpayers will, and will not, support at the ballot box. We use a variety of tools and strategies, all of which are focused on listening—truly listening.

Some consultants like to do stealth campaigns in which taxpayers are not involved in the planning process. That is the opposite of our approach. Every step we take and every recommendation we make is out of respect to the local taxpayer.

Members of our team have collectively worked on hundreds of public engagement projects the past 29 years in Illinois and nationally and we welcome the opportunity to apply what we have learned to the benefit of your district's community engagement program.

Among the Illinois school district clients we have assisted as a team with community engagement efforts include New Trier 203, Glenview 34, CHSD 99 (Downers Grove), and Maine 207, among others.

We look forward to your decision and welcome the opportunity to further discuss our proposed strategies and approach.

Respectfully submitted,

A handwritten signature in black ink that reads 'Paul A. Hanley'.

Paul A. Hanley
Managing Director
Beyond Your Base

BEYOND YOUR BASE

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211 North Clinton Street, Suite 3N, Chicago, IL 60661
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OUR SERVICES

PUBLIC POLICY TRAINING

When it comes to developing and implementing a pre-referendum program, it's critical that everyone is on the same page. Our kick-off meeting includes a review and discussion of key public policy strategies, timelines and budgets, assignments, and important do's and don'ts.



New Trier Township High School District 203 retained Paul Hanley to help us develop and implement a comprehensive public outreach program. He assisted our team with issue framing, voter analyses, public opinion research, direct mail, earned media and other important tasks. In the end, our district was successful in obtaining 65 percent support for an \$89 million bond issue. I was extremely impressed with Mr. Hanley's knowledge, expertise, guidance and responsiveness to our needs.



- **Dr. Linda Yonke**
Former Superintendent
New Trier Township
High School District 203, IL

VOTER ANALYTICS

Preparing a comprehensive voter analysis is a must-have when conducting public opinion research as well as developing a budget for a community engagement program.

TIMELINES & BUDGETS

There are more than 20 key action steps that must be tackled prior to making the decision to place a funding proposal on the ballot. Our team knows precisely when and how these steps should be implemented. We are also expert in estimating hard and soft costs tied to pre-referendum programs. .

MESSAGING

We specialize in making complex issues easy to understand. Our team has a thorough understanding of the challenges facing school districts, which is essential in crafting persuasive messaging. Through decades of experience managing public engagement efforts, including extensive public opinion research, we know the big questions voters want answered.

CREATIVE

BYB believes that design is as important as your core message. That is why we have recruited seasoned designers to craft award-winning branding, direct mail, and other essential collateral.

DIRECT MAIL

Direct mail is a strong part of our team's pre-referendum strategy. We develop mail that actually gets read.



OUR SERVICES (CONT.)

DIGITAL/SOCIAL MEDIA

We are prepared to work with District 23 in leveraging current social media platforms, helping the District effectively communicate with all stakeholders.

PUBLIC OPINION RESEARCH

There is no need to guess whether your electorate supports your proposed capital and programming improvements. By employing public opinion research, our team can gauge local taxpayers' attitudes and opinions regarding your needs and proposed solutions.

BALLOT LANGUAGE

Our team serves as a second set of eyes to ensure that your ballot question captures what is learned during the public engagement process. This input alone can mean the difference between a win or a loss.



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OUR APPROACH

WE'RE FOCUSED ON DEVELOPING LONG-TERM TRUST WITH YOUR TAXPAYERS.

Our goal is to involve local taxpayers in the planning process. We work overtime to ensure that everyone's voice is heard. We've learned that if you want to garner strong voter support for tax-related referenda, it needs to be the community's plan.

“ Over the past 10 years, Paul Hanley has assisted our school district with four successful ballot measures, providing approximately \$800 million in funding. His taxpayer-focused strategies have allowed our district to address its highest priority capital improvement and operating needs, benefiting more than 30,000 students. ”

- Dr. Don Haddad, Ed.D.
Superintendent
St. Vrain Valley
School District

BUILDING STRONG COMMUNITY SUPPORT IS AN ART AND A SCIENCE.

We put public engagement on steroids through the use of voter analytics, a comprehensive public information program, public opinion research, and other highly effective tools and strategies.

WE DON'T DABBLE IN REFERENDA WORK. IT'S ALL WE DO.

Our clients include school districts, community colleges, municipalities, counties and special districts in Illinois and nationally. We focus on assisting public entities with addressing their highest priority operating and/or capital improvement funding needs, while simultaneously building long-term trust with their community.

OUR TEAM UNDERSTANDS WHAT'S AT STAKE.

Preparing students to be successful socially, emotionally and academically, including the District's youngest students. Creating modern, flexible learning spaces. Providing equitable facilities and opportunities for all students. Protecting property values. We know what's at stake when it comes to tax-related referenda. It's why we come in early and leave late.

IT TAKES EXPERIENCED PROFESSIONALS TO DO THIS RIGHT.

When you work with our team, you have access to some of the industry's most experienced public policy and public opinion research professionals, writers, graphic designers, and voter data specialists. With decades of experience, we know what it takes to effectively engage local taxpayers and properly involve them in the planning process.



THREE-PHASE APPROACH

The community engagement approach that our team proposes can be broken into three phases: Needs Assessment, Public Outreach, and Opinion Research/Follow-Up. Our approach is focused on respecting all stakeholders and only making the decision to place a funding proposal on the ballot after it has been properly vetted by the community.

PHASE 1: It's all about doing your homework.

NEEDS ASSESSMENT

There are a variety of key tasks that need to be accomplished as part of the Needs Assessment phase of the process, including preparation of a comprehensive public policy timeline and budget; development of a voter analysis to be used for future public opinion research; execution of a kick-off meeting and training session with staff; crafting of your core message; and preparation of a key influencer database.

“ Our bond measure passed with 76% support. Why? Because we asked our community what they wanted to do with their schools. Paul Hanley and his team guided authentic stakeholder engagement that generated our community's plan. People support what they help to create. ”

- **Dr. Brian K. Wegley**
Superintendent
Northbrook/Glenview
School District 30

KICK-OFF WORKSHOP/TRAINING

The virtual kick-off training workshop will allow District 23 staff to get to know our approach and share their thoughts on the District's needs and proposed solutions. A preliminary timeline and budget will be reviewed at this meeting, and a final version that includes the District's input will be supplied shortly thereafter.

COMPREHENSIVE VOTER ANALYSIS & REVIEW OF TIMING ISSUES

BYB will prepare a detailed voter analysis based on historical voting records for the District, projecting voter turnout, demographics of the electorate, and other important data. This information is extremely important when developing a public information program and when implementing public opinion research. Voter demographics change from one election to the next and it's important to understand them.

KEY INFLUENCER DATABASE

We will provide guidance to District 23 in developing a key influencer database that includes a diverse group of business leaders, civic leaders, education leaders, major property taxpayers, seniors, parents, non-parents, and other community opinion shapers. From this list, the District will identify potential task force invitees.

CITIZEN TASK FORCE TO VET PROPOSAL

While it is our understanding that your architect will help facilitate Citizen Task Force meetings, BYB and MYB will be available to provide input on the timing of meetings and agendas.

CORE ARGUMENT & SUPPORTING DATA

We will assist District 23 in preparing its core argument and other messaging. Our team will also work with the District in preparing a PowerPoint presentation and a frequently-asked-questions (FAQ) document for future public outreach efforts and for posting on the District's website.

“ Through a comprehensive public policy program, Paul Hanley was able to define what our local taxpayers would support and presented these results in a clear and understandable manner. Without his guidance, we would have surely asked for too much at the ballot box. ”

- **Dr. Steven R. Wroblewski**
Superintendent
LaSalle-Peru Township
High School District 120



PHASE 2:

Priming the pump is a must-do before public opinion research is conducted.

PUBLIC INFORMATION PROGRAM

Implementing a comprehensive public information program with a consistent message is extremely important. It's critical that District 23 flush out any and all concerns that taxpayers may have well before a referendum is pursued. It's also important that the District's voters be well-informed before they participate in public opinion research.

COMMUNICATING WITH REGISTERED VOTER HOUSEHOLDS

BYB and MYB are prepared to assist District 23 with voter identification efforts, issue framing and messaging, copywriting, graphic design, print and mail oversight, and other tasks. We recommend that at least two informational pieces be sent to all registered voter households prior to conducting public opinion research.

COMMUNITY OUTREACH MEETINGS

BYB recommends that District 23 host informational webinars and in-person meetings, if possible. These meetings will be open to all residents and have several purposes: to disseminate information, gather feedback, and answer questions. We suggest these meetings include representatives of the District, architecture firm, and finance team to address academic benefits, design, and financing questions. Information collected at these meetings is used to refine plans and inform the quantitative research included in Phase 3 of this proposal. We recommend promoting informational webinars via the District's website, informational mailers, email, social media, and earned media. Our team will assist with presentation materials and in developing tools to capture community feedback.

COMMUNITY COMMENT

After the public information program has been implemented, our team recommends that District 23 conduct a mail survey.

PHASE 3:

You then need to ask voters what they think. More importantly, will they pay for it?

MAIL SURVEY

Mail surveys are an excellent method of informing taxpayers about the District's facility and programming needs and proposed solutions, in addition to gathering feedback. They are best described as a "town meeting from your kitchen table." Rather than giving only a small random sampling of voters in District 23 the chance to voice their opinion, the mail survey would be sent to every registered voter household in the District. The information gathered via previous informational webinars or in-person outreach meetings may be used to inform the mail survey. BYB will develop the mail survey questions, provide graphic design and copywriting services, oversee production and mail services, conduct data entry, and analyze the survey results.

TASK FORCE RECOMMENDATIONS

The results of the public opinion research will be shared with the Citizen Task Force. Paul Hanley will be available to discuss the findings with the Task Force as well as with the Board of Education.



“ As school districts consider referendums to modernize and improve their school buildings, it is imperative that the process include skilled and expert advice, which is precisely what Paul Hanley provides. Paul has helped many districts, including ours, run successful campaigns. He is one of the nation's very best referendum consultants, and districts that want to get it right the first time can count on Paul Hanley to give them the best chance of success. ”

- **Dr. Ken Wallace**
Superintendent
Maine Township High
School District 207

BALLOT QUESTION

If the Board of Education decides to move forward in placing a funding proposal on the ballot, BYB is prepared to provide input on the ballot question prepared by bond counsel. Sometimes the ballot question is the **ONLY** information that a voter may read prior to making a decision on the measures. It is important that the information presented in the ballot question takes into consideration the public opinion research.

FOLLOW-UP CORRESPONDENCE

We recommend that District 23 send a follow-up information piece to registered voter households, which would provide the electorate with an update on the public opinion research as well as actions likely to be taken by the Board of Education in connection with the funding proposal.



OUR TEAM



Paul A. Hanley
Managing Director
Beyond Your Base

Paul A. Hanley, Managing Director of Beyond Your Base, has been involved with hundreds of successful tax-related ballot measures over the past 29 years on behalf of municipalities, counties, school districts, community colleges and special districts throughout the nation. He will serve as project lead overseeing all services provided by BYB to District 23.

With a strong commitment to meeting both the needs of his clients and their respective taxpayers, Mr. Hanley has a long track record of assisting public entities build strong, long-term trust with taxpayers. He is committed to developing funding options that are community-driven.

Mr. Hanley coordinates a team of seasoned writers, graphic designers, voter database specialists and public opinion research professionals who are uniquely experienced in helping public entities implement comprehensive public information programs.

Mr. Hanley's public policy and election work has received the *Gold Medallion Award* from the National Council for Marketing and Public Relations.

Among Mr. Hanley's areas of expertise include:

- **Community Outreach Programs**
- **Voter Analytics**
- **Public Opinion Research**
- **Community Task Force Facilitation**
- **Pre-Referendum Training**
- **Campaign Management**

Mr. Hanley is a frequent speaker on public policy and election strategy at local, state and national conferences.

Mr. Hanley holds a bachelor's degree from the University of Michigan and master's degree from the University of Colorado.



Marcia Sutter
Founder
Minding Your Business

Marcia Sutter Marcia Sutter is the founder of Minding Your Business, a consultancy that provides qualitative research, project management, communication, and community engagement support to educators, entrepreneurs, and non-profits. Her advertising and marketing experience, coupled with her deep understanding of public education, enable her to produce communication materials and community engagement strategies that resonate with all school stakeholders—community members, board members, parents, staff, and students.

Ms. Sutter worked with the Winnetka Public Schools from 2010-2015. She developed the District's first integrated communication plan and was instrumental in completing their strategic plan. She was an Illinois School Public Relations Award (INSPRA) winner in 2011, 2012, and 2013, and received a Golden Achievement Award for Winnetka's strategic plan and community engagement project.

A resident of the North Shore, Marcia understands the culture and climate of school districts, Illinois school finance, and local governance. In addition to Winnetka District 36, her education clients include Palatine Community Consolidated District 15, River Trails School District 26, Glenview School District 34, Glencoe School District 35, Downers Grove Grade School District 58, Hawthorn School District 73, Schiller Park School District 81, Brookfield LaGrange Park District 95, Downers Grove Community High School District 99, North Shore School District 112, Oak Park and River Forest High School District 200, Warren Township High School District 121, New Trier Township High School District 203, Elmhurst Community School District 205, and Maine Township High School District 207.

She holds a BS in Communication and Film from Boston University's School of Public Communication.



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SAMPLING OF CLIENTS SERVED

Following is a list of clients served by Paul Hanley, Managing Director of Beyond Your Base:

“Paul Hanley’s approach is about connecting, listening, and understanding the community. His efforts helped us determine what our taxpayers valued and his work was essential in passing a \$136.6 million bond issue with strong support. As our construction is underway, I am continually complimented on the process of securing support for the project as a key part of the product. The two are inseparable to our residents.”

- **Dr. Hank Thiele**
Superintendent
Community High School
District 99

“I don’t know anyone who knows more about effectively engaging taxpayers than Paul Hanley.”

- **Michael McCarty, CPRP**
Executive Director
Glenview Park District

- Adams County School District 14, CO
- Aspen School District, CO
- Carbon County School District, WY
- Community High School District 99, IL
- DeBeque School District, CO
- Eagle County School District, CO
- Fowler School District, CO
- Garfield School District RE2, CO
- Garfield County School District 16, CO
- Glenview School District 34, IL
- Gunnison Watershed School District RE-1J, CO
- Haxtun School District, CO
- Hinsdale School District 86, IL
- Hinsdale School District, CO
- Holyoke School District, CO
- Ignacio School District, CO
- LaSalle-Peru Township HSD 120, IL
- Maine Township High School District 207, IL
- Mapleton School District, CO
- Meeker School District, CO
- Mount Prospect School District 57, IL
- New Trier Township High School District, IL
- Northbrook-Glenview School District 30, IL
- Platte Valley School District, CO
- Pueblo School District No. 60, CO
- Salida School District, CO
- Sweetwater County School District #1, WY
- Summit School District, CO
- St. Vrain Valley School District, CO
- Telluride School District, CO
- Thompson School District, CO
- Weld County School District Re-1, CO
- Weld County School District Re-3J, CO
- Weld County School District Re-4, CO
- Weld County School District Re-5J, CO
- Weld County School District Re-8, CO
- West Grand School District, CO
- Westminster Public Schools, CO
- Casper College, WY
- Central Wyoming College, WY
- Kirtland Community College, MI
- Jackson College, MI
- Lake Michigan College, MI
- Montcalm Community College, MI
- Muskegon Community College, MI
- City of Fruita, CO
- City of Palos Heights, IL
- Eaton Area Parks and Recreation District, CO
- Englewood Park & Recreation, CO
- Estes Valley Recreation & Park District, CO
- Frankfort Park District, IL
- Fraser Valley Metro Recreation District, CO
- Glenview Park District, IL
- Park Ridge Park District, IL
- Joliet Park District, IL
- Montrose Recreation District, CO
- Town of Windsor, CO
- West Chicago Park & Recreation District, IL
- Carbon County, WY
- Converse County, WY
- City of Firestone, CO
- City of Louisville, CO
- City of Sheridan, CO
- Town of Bennett, CO
- Town of Frederick, CO
- Larimer County, CO
- Park County, WY
- Socorro County, NM
- Sweetwater County, WY
- Village of Franklin Park, IL
- Village of Villa Park, IL
- Colorado River Fire Rescue, CO
- Calhan Fire Protection District, CO
- Durango Fire Protection District, CO
- Falcon Fire Protection District, CO
- Larkspur Fire Protection District, CO
- Louisville Fire Protection District, CO
- Lyons Fire Protection District, CO
- North Metro Fire Protection District, CO
- Platteville-Gilcrest Fire Protection District, CO
- Trilakes Monument Fire Protection District, CO
- Windsor-Severance Fire Protection District, CO
- Basalt Library District, CO
- Huntley Area Public Library District, IL
- Lemont Library District, IL
- Pueblo Library District, CO
- White Oak Library District, IL
- Central Colorado Water Conservancy District, CO
- Grand River Health, CO
- LaPlata Archuleta Water Conservancy District, CO
- Security Water District, CO



OUR REFERENCES

Hanley/Sutter References:

Glenview School District 34, IL

Dr. Dane Delli
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ddelli@glenview34.org
847.998.5004

Maine Township High School District 207, IL

Dr. Ken Wallace
Superintendent
kwallace@maine207.org
847.696.3600

Community High School District 99, Downers Grove, IL

Dr. Hank Thiele
Superintendent
hthiele@csd99.org
630.795.7102

New Trier Township High School District, IL

Niki Dizon, Director of Communications & Alumni Relations
dizonn@newtrier.k12.il.us
847.446.7000

Hanley References:

LaSalle-Peru Township High School District 112, IL

Steven R. Wroblewski
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815.223.2372

Northbrook-Glenview School District 30, IL

Dr. Brian K. Wegley
Superintendent
bwegley@district30.org
847.400.8984

Additional references are available upon request.

“ I can't speak highly enough of Paul Hanley and the job he did in leading our district to a successful Education Fund referendum. He adeptly led us through the entire process including the voices of all key stakeholders. We passed our referendum with 76% support and that's greatly due to the leadership of Paul. ”

- **Dr. Elaine Aumiller**
Superintendent
Mount Prospect
School District 57, IL



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FEE SCHEDULE

Beyond Your Base proposes a fixed-cost fee of Thirty-Five Thousand Dollars (\$35,000) for public outreach services. BYB will NOT charge an agency service fee or a separate fee for graphic design services.

Marcia Sutter with Minding Your Business proposes an hourly rate of \$100. It is estimated that Ms. Sutter's fee would not exceed Fifteen Thousand Dollars (\$15,000).

“Beyond Your Base provided Glenview School District 34 with a comprehensive approach to educating the public, assessing its wishes, and involving community stakeholders. Our successful \$119M referendum is evidence of a well-informed community that understood the need for and the benefits of the improvements and the positive impact this will have for decades into the future.”

- Dr. Dane A. Delli, Ph.D.
Superintendent
Glenview School District 34

The services that will be provided by Beyond Your Base (BYB) and/or Minding Your Business (MYB) include:

- Conduct a virtual kick-off meeting/training session for District 23 staff (BYB, MYB)
- Develop a comprehensive public outreach budget and timeline (BYB)
- Conduct a voter analysis, information needed for public opinion research (BYB)
- Provide guidance in development of a database of community opinion shapers from which to identify possible Task Force invitees (BYB)
- Provide input on the timing of Citizen Task Force meetings and agendas (BYB, MYB)
- Train District staff to conduct additional community outreach meetings and facilitate table discussions (MYB)
- Provide issue framing, messaging, copywriting, graphic design and oversight of a maximum of three mailings containing factual information to registered voter households (BYB, MYB to provide review and edits)
- Assist in preparing a PowerPoint presentation for public information meetings (BYB, MYB to provide review and edits)
- Assist in preparing a frequently-asked-questions (FAQ) document (BYB, MYB)
- Assist in preparing a script for an informational video (MYB)
- Develop a mail survey to be sent to all registered voter households. Oversee graphic design, copywriting, printing, mailing of survey, data entry, and analysis (BYB, MYB to provide review and edits)



PROPOSAL TO PROVIDE COMMUNITY ENGAGEMENT SERVICES
PROSPECT HEIGHTS SCHOOL DISTRICT 23



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“ Paul Hanley assisted our district with a great plan. He identified our likely voters, developed a message that would resonate, and dialed in a dollar amount that had a fighting chance of success. With his strategies of engagement, the district was successful in passing a \$218 million bond measure. ”

- David Horner
Chief Financial Officer
Pueblo School District 60

- Present results of mail survey to the Board of Education and Task Force (BYB)
- Provide input on ballot question, if pursued (BYB, MYB)
- Provide ongoing consultation in connection with District 23's community outreach program (BYB, MYB)

Reimbursable Expenses:

District 23 will be responsible for all expenses related to the project including but not limited to printing, mailhouse and postage costs associated with direct mailers to registered voter households; printing, mailhouse and postage costs associated with the mail survey, including postage and postal fees tied to reply envelopes; mail survey crosstabs; scanning and uploading mail surveys; voter data needed to conduct a voter analysis and mailing lists needed for the mail survey; copies; and overnight shipping costs.

Travel Expenses:

BYB and MYB will also request reimbursement for out-of-pocket travel expenses, including airfare at coach rate, parking, local transportation and lodging.



PRELIMINARY TIMELINE

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Following is a preliminary timeline of proposed action steps with which BYB and MYB will be involved. This timeline is based on an April 2023 election date.

Winter 2022

- Prepare preliminary voter analysis
- Prepare first draft of community engagement program timeline and budget
- Conduct virtual kick-off/training session to review community engagement strategy, timeline, and details of capital improvement and programming needs
- Provide guidance in defining future Citizen Task Force invitees
- Assist in developing a preliminary Plan A and Plan B to share and test with Citizen Task Force
- Define assets (photos, elevations, floor plans, etc.) needed for future informational mailers, presentations and video
- Prepare input on composition of the Citizen Task Force and meeting agendas

Spring 2022

BYB recommends the Citizen Task Force meetings, which would be facilitated by the District's architect, take place in March through May.

Summer 2022

- Develop core message, including a frequently-asked-questions document
- Develop two informational mailers
- Develop mail survey
- Assist in preparing script for informational video, if pursued

Fall 2022

- Finalize and execute first two informational mailers
- Provide guidance on informational webinars and/or in-person outreach meetings
- Provide guidance on information to be posted on District's website
- Conduct mail survey and prepare analysis
- Present results of public opinion research to Citizen Task Force
- Review public opinion research with Board of Education
- Provide input on ballot question, if pursued
- Develop and execute follow-up mailer, if pursued