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▶ BOND AND TRE PLANNING

OVERVIEW

Cambridge owns an election planning process that translates a strategic plan's intent into an appropriate course of action for a joint TRE and bond election. The results of this process are two-fold: a detailed outline of projects, costs, and schedules that voters will be asked to consider as a bond election; and a well-planned recommendation for an M&O tax rate election that provides an appropriate amount of revenue to fund district maintenance and operations.

This joint planning process for a bond election and TRE brings together a microcosm of the community to explore the need defined by district leaders. It allows this objective group of citizens to wade through the reports of existing conditions, space requirements, public opinion survey findings, budgeting, funding formulas, revenue projections/shortfalls, and other vital data to discover for themselves why a bond election and TRE are both necessary.

It is important to understand that clients who work with Cambridge are the beneficiaries of a unique process that is customized to the specific needs of the system. The following information provides a framework from which we can tailor our process to best serve the needs of your district and your community.

We recommend the formation of a Community-Based Advisory Committee (CBAC) with 45-60 participants representing a diverse cross-section of the District. District administrators may participate as advisors to the Committee but should not serve on the Committee. One or more of the community members should chair/co-chair the Committee. This group meets regularly with a Cambridge facilitator for 90 days, or until such time that they come to *agreement* on a recommendation for consideration by the Board of Trustees. By agreement we mean each community member on the Committee fully endorses every aspect of the two proposals they have developed together. The Board can approve each plan as submitted or may send them back to the Committee for further work if they believe certain elements may not have been fully addressed. However, in the end, it is absolutely critical that the Board honor the work of this Committee. This does not mean the Board has to accept the recommendations without question.

Affording this group of citizens the opportunity to become thoroughly educated about the complexities of your facility program and financial condition, combined with the authority to recommend a course of action to your Board for their consideration, generates a mass of energy and grass roots momentum.

Aside from developing a concrete course of action, this process is a powerful tool for strengthening public confidence in the district and its leadership. It demonstrates the leadership's understanding that the district belongs to the community, and that the leadership views the community to be its partner in big decisions that have a profound impact on those communities it serves. Those serving on the Community Advisory Committee take ownership of the plans they helped create and become champions for the bond and TRE plans, which is critical to achieving success in the ensuing election.

COMMITTEE CHARGE

The Board of Trustees appoints a Community Bond Advisory Committee for the purpose of developing a community-driven capital improvement plan that, in the end, each of its members can endorse as a recommended course of action. Specifically, the Committee will:

- ▶ Represent the entire school district attendance boundaries
- ▶ Consider the district's beliefs, mission, and objectives
- ▶ Consider the district's master plan
- ▶ Tour the facilities during peak use if appropriate
- ▶ Consider facility improvement options and prioritize projects
- ▶ Consider financial impact on taxpayers and determine schedule of priorities
- ▶ Agree upon a total dollar amount for a bond election
- ▶ Study funding formulas, district budget, and revenue projections/shortfalls
- ▶ Agree upon an appropriate M&O tax rate to fund district maintenance and operations
- ▶ Determine best timing for an election
- ▶ Make a recommendation to the Board of Trustees and superintendent

BOND AND TRE PLANNING

PROCESS SUMMARY

(This is a framework that would be customized to suit the specific circumstances of your school district. Client should reasonably expect this process to expand the course of 3-5 months and as many as 8-12 meetings to fully cover the material required to prepare appropriately for a bond election and TRE on the same ballot.)

1. Administration and Board determines make up of Community-Based Advisory Committee.
2. Board and Administration meet to set the parameters of the Committee.
3. Committee is given their charge at the first meeting and elects Chair(s) and secretary.
4. Committee is provided information in presentation form on items such as, but not limited to the district master plan, bond history, public opinion survey findings, facilities assessments, demographics, instructional goals, financial state of the district, funding formulas, and revenue projections/shortfalls.
5. The Committee will determine criteria for a priority list to determine what items will be proposed to the Board for a possible bond election. For example all priority one items might fall into the category of health and safety or overcrowding. These priorities are specific to each district and will be useful in explaining how the Committee reached the decisions they made about what was included in the election.
6. The Committee studies a list of needs for each project identified by administration. It is important to leave costs out at this point so the prioritization process is not compromised. Keeps the Committee's work "need driven" versus "cost driven". Some items such as code or ADA requirements may be taken out and explained to the Committee as "must do" items. This could be the starting point or the Committee could use this as a priority one criteria.
7. The Committee breaks into smaller groups and prioritizes each line item based on the criteria established earlier and using the worksheet provided by Cambridge. The Committee can break into smaller groups based on campus, areas of need (secondary versus elementary), or randomly selected groups. This could take several meetings.
8. The smaller groups report their findings to the larger group.
9. Cambridge attaches costs to all one and two priority items.
10. Committee refines priority lists after reviewing items with costs attached. This may take several meetings.
11. Committee determines all priority one items to be proposed to the Board.
12. Financial advisors present tax implications of the draft bond plan to Committee.
13. Committee reaches agreement on all items to be proposed to the Board for a bond election, including projects, timing, and number of propositions.
14. Committee studies the current financial state of the district by reviewing budget, revenue projections/shortfalls, tax rate history, and the options available to the district. Expect this to take several meetings.
15. Committee chairs present their recommendations for a bond election and TRE to the Board.
16. Board reviews Committee's recommendation and if necessary schedules a workshop with the Committee to discuss any possible changes and questions.
17. After consideration of final Committee recommendation, the Board calls for an election.

Note: It is very important that the Committee makes its recommendation based on criteria agreed upon as important by the district and Committee. It is also extremely helpful for the Committee chairs to give regular updates to the Board to keep them informed of the process so any concerns can be voiced early on rather than at the conclusion of the Committee meetings.

▶ BOND AND TRE PLANNING

WHAT WILL CAMBRIDGE DO SPECIFICALLY?

As Planning Facilitator, Cambridge will:

- ▶ Influence the process with knowledge/expertise acquired through substantial experience in winning elections
- ▶ Provide guidance on participant selection
- ▶ Work closely with Committee chairs
- ▶ Prepare the Committee chairs for each meeting
- ▶ Draft meeting agendas and schedules
- ▶ Attend Committee meetings and guide group through agendas (important that chairs are faces in front of Committee, not Cambridge)
- ▶ Provide necessary technical information to Committee (scenarios, cost estimates, schedules, engineering reports, etc.) through its architectural consultant
- ▶ Provide necessary financial information to Committee through district's financial advisor and business office
- ▶ Work with district to develop and execute communications strategy specifically for the planning process (Web copy, press releases, producing mailer to voters, etc.)
- ▶ Work with chairs to package the Committee's recommendation for the Board's consideration (presentation)

Related to the Public Opinion Survey, Cambridge will:

(This survey provides a thorough assessment of public attitudes toward the district, tests messages, and determines what projects and M&O tax rate scenarios voters would most likely support and oppose in a bond election and TRE.)

- ▶ Facilitate the drafting of the survey questionnaire
- ▶ Retain the services of an appropriate polling firm to put the survey in the field
- ▶ Provide a detailed report of the survey findings
- ▶ Schedule a presentation of the survey findings for the Board and Administration

In Regard to the District's Information Campaign Strategy, Cambridge will work with district to develop an information campaign strategy and execute that strategy, which will include:

- ▶ Generating contact lists of registered voters (phone and mail)
- ▶ Drafting key messages (most important 3-5 points you want to communicate consistently)
- ▶ Identifying target audiences (various groups of voters, such as registered voter booster club members)
- ▶ Selecting an appropriate mix of print, electronic, and social media communication tools (brochure mailers, email blasts, phone, Facebook, etc...)
- ▶ Developing an informational presentation (Power Point)
- ▶ If desired, designing your materials and coordinating printing, production, and mailing
- ▶ Creating a schedule of action
- ▶ Creating a budget

Voter Targeting Software

We will set up the web-based software so that we can upload local lists (student directory info, civic club membership rosters, alumni rosters, etc.), which will allow you to communicate directly with registered voters in each of these groups with messages that speak directly to the interests of each identified group (like registered voter empty nesters, for example).

Voter Pulse Survey

This is simply us taking a quick pulse of the voters a few weeks before the election to determine levels of awareness regarding the bond and TRE. This will help the district identify where to focus its communication efforts in the remaining days prior to the election.

NOTE - CONSULTANTS

Cambridge may elect to involve other consultants (such as its sister company SHW Group) as needed with district approval to ensure the best possible service and results. Fees for these consultants would be covered in the fee you agree to pay Cambridge if you decide to employ our services.

▶ INFORMATION CAMPAIGN STRATEGY

Cambridge will work with the District's leadership to plan and implement a thoroughly strategic information campaign that conforms to Title 15 of the Texas Election Code as enforced by the Texas Ethics Commission. Built upon a track record of unparalleled success with more than \$7 billion in bond elections passed over the last nine years with a 90 percent rate of success, our team has the experience to lead CHISD in this endeavor.

In information campaign strategy, you must:

- ▶ Start with your strategic plan
- ▶ Know your audience
- ▶ Do your homework
- ▶ Have an appropriate bond package
- ▶ Involve your community
- ▶ Engage your leaders (administrators and board)
- ▶ Define a clear and concise message
- ▶ Research voter history and identify target groups
- ▶ Deliver your message consistently to these voters

It is our belief that CHISD has an ethical obligation to inform its constituents about any election so that they may make an educated decision. In order to inform CHISD voters efficiently and effectively, Cambridge will facilitate the development of a comprehensive information campaign strategy customized for CHISD using strategies such as those outlined in the following paragraphs. *NOTE: The following strategies would be used for the sole purpose of information dissemination.*

Voter Pulse Survey

This survey is intended to identify informed and uninformed voters in order to target where information is needed, what specific information is needed, and how it should be delivered. It will also test levels of support for various projects under consideration, which is valuable information as the district and community advisory committee move through the election planning process. Projects with low levels of support probably shouldn't be included in the final bond package. The reverse is also true.

Define Key Messages

The efforts of the process discussed heretofore provide critical leads on what the most important messages are for the District to communicate. Identifying the things that are on the minds of your public allows you to create your key messages so they are relevant and timely.

Identify Target Audiences

Mass communication is no longer an effective means to get a message out through an entire community. An effective campaign identifies the many subgroups in the population and creates informative messages specifically for those groups; voters have a right to be fully informed of the details of the election and school districts are obligated to provide this information. For example, you may want to consider focusing on households with new parents who are likely not fully informed about the election. Target groups could include alumni, parents by campus, business community, staff by campus, clergy, city officials, opinion leaders, and senior citizens. Perhaps you want to target those households with residents ages 59-64 to help them understand what happens to their tax rate the year they turn 65. If you plan to be heard, your messages should be broadcast on the frequency of your target rather than from your frequency.

Voter Targeting Software

Unlimited access and use of web-based voter targeting software tool that allows you to generate phone, walk and mail lists by ISD campus, zip codes, polling precincts, club memberships, alumni groups, age groups, gender, etc. Use of this software in combination with the Voter Pulse Survey will help the District efficiently and effectively fulfill their obligation to fully inform voters.

▶ INFORMATION CAMPAIGN STRATEGY

Respect Ethics Guidelines

With public institutions under the microscope it has never been more important to adhere to the rules of ethics as enforced by the Texas Ethics Commission (TEC). Cambridge maintains frequent contact with the TEC through its work on many elections across the state and can provide insight on how it might rule in specific circumstances. Ultimately, however, it is your attorney who would be defending you in court should an issue arise, which is why it is always prudent to seek their counsel.

Develop a District Information Campaign Plan

- ▶ Identify stakeholder groups
- ▶ Develop key messages for each stakeholder group
- ▶ Identify fully informed groups and those in need of more information
- ▶ Develop strategies for communicating with each group
 - *Personal connection with voters by phone call and door-to-door*
 - *Presentations to civic clubs and at other local events*
 - *Social media tools such as Facebook and Twitter*
 - *Direct mail*
 - *Electronic communication via web and email*
 - *Paid advertising (billboard, ads, signs) where appropriate*
- ▶ Develop a correlating informational campaign budget
- ▶ Generate a schedule of action

Target Voters

- ▶ Research voter history
- ▶ Acquire current list of registered voters
- ▶ Generate detailed voter phone, walk; and mail lists by zip code; K12 campus; zip codes; polling precincts; club memberships; age groups; gender; etc.
- ▶ Track early voters to create election day target lists

Leverage Technical Support Available through Cambridge

- ▶ Copy writing
- ▶ Graphic design
- ▶ Web development
- ▶ Presentation development
- ▶ Social media execution