



MORE THAN ARCHITECTS

October 9, 2020

Dr. Nicole Poenitzsch
Bellville Independent School District
518 South Matthews Street
Bellville, Texas 77418

Re: Bond Planning and Informational Campaign Services for Bellville ISD
Project Name: Bond Planning and Informational Campaign
Project Number: 01882-00-02

Dear Dr. Poenitzsch,

We are pleased that Huckabee & Associates, Inc. has been selected as the most qualified firm for the following scope of services. We are excited about the opportunity to submit the following Bond Planning and Informational Campaign Proposal for Bellville ISD.

Bond Program Development

Huckabee will guide Bellville ISD through the development of a bond steering committee and a transparent, consensus-building process that should engage community members, local businesses, parents and other stakeholders in the planning of a potential bond program.

The committee should meet over the course of several weeks or months, for approximately five meetings, to study the District's current educational facilities, the long range planning results, and financial information and come to a recommendation for the Board of Trustees to consider.

Huckabee will develop cost estimates, schedules and a program of requirements for each project studied and recommended by the bond steering committee. Project expectations are established up front to help maintain the budget, schedule and scope during the design process.

During the bond planning process, Bellville ISD should complete a third-party community survey. A third-party survey is an unbiased, scientific approach to measuring the opinions of your voters regarding Bellville ISD and your potential bond projects. The information generated from a survey will become a significant factor and source of information as the scope of the bond is finalized.

Huckabee

AUSTIN • DALLAS • FORT WORTH • HOUSTON • SAN ANTONIO • WACO
www.huckabee-inc.com

Upon completion of the bond planning process, is a community-based final recommendation ready for submission to Bellville ISD's Board of Trustees.

- Strategize with Bellville ISD on the process for the community engagement in potential bond development
- Develop citizens committee charge, membership criteria, invitation and meeting scope based on strategy discussed with Bellville ISD
- Attend Board meetings for presentations and to answer questions
- Frequent coordination meetings with District staff to develop citizens committee process
- Coordination with a third-party survey company to generate and administer a community survey
- Review results of the survey and provide conclusions on bond details
- Prepare meeting content for citizens committee meetings
- Attend citizens committee meetings and provide support to Bellville ISD in facilitation of citizens committee process
- Project planning and bond scope development per direction by the citizens committee
- Assist with Committee Recommendations presentation
- Provide training to Board and Administration on laws and ethics of school board elections
- Work with financial advisor and bond council to prepare election order

The Bond Election Informational Program

Huckabee's in-house community engagement department will assist the District with the planning, development and implementation of a bond informational program.

- Informational program strategy and timeline
- Development of program branding and messaging
- Voter analysis and support for voter registration push
- Ethics guidance for board and staff
- Develop informational marketing materials, including content and graphic design for election website, brochures, mailers and public presentations
- Regular upkeep of bond website and presentation
- Assistance with social media content
- Approximately six (6) in-person coordination meetings with district staff and virtual/teleconference coordination as needed

Fee Proposal

Huckabee proposes a lump sum fee of \$80,500 for all of the services outlined above plus the cost of the following:

1. Printing services billed at cost (no markup) and approved by Bellville ISD in advance

If a Bond Election is desired, the cost of the voter survey is not included as part of this proposal and shall be funded by Bellville ISD.

Work performed under this contract does not preclude Huckabee from being eligible to provide A/E services for future projects.

Huckabee appreciates the opportunity to continue our relationship with Bellville ISD.

Sincerely,



Devin Wilson – Vice President
Huckabee

If the attached proposal is acceptable, please sign and return one executed copy.

Signature

Printed Name

Title

Date

The Texas Board of Architectural Examiners, P.O. Box 12337, Austin, Texas 78711-2337 or 333 Guadalupe, Suite 2-350, Austin, Texas 78701-3942, 512-305-9000, www.tbae.state.tx.us has jurisdiction over complaints regarding the professional practices of persons registered as Architects in Texas.

Bellville ISD Bond Planning

Bond Committee

Meeting 1: Bond Overview / Defining Consensus

State of the District

Overview of the DAC and CIC Work

The Bond Planning Process Committee Charge & Process

Defining Consensus

PRE: Finalize membership; define charge; work with survey company on questionnaire based on project list from CIC; launch survey.

Meeting 2: School Finance / Survey Results

How School Finance Works

Bellville Financial Overview

Bonding Capacity & Tax Impact Scenarios

Community Survey Results

PRE: Prepare financial analysis with district financial advisor; finalize survey results for Board and committee.

Meeting 3: Building a Bond / Project List Review

Building a Total Bond Project Budget

Long Range Plan & Potential Projects Project

Discussion & Feedback

POST: Complete any project-related homework from committee.

Meeting 4: Reaching Consensus

Project Discussion Continued

Prioritization and Consensus Building

POST: Complete any project-related homework from committee.

Meeting 5: Reaching Consensus Continued... (If needed)

Finalize Recommendation

Discuss Presentation & Spokespersons

Next Steps

POST: Prepare Recommendations to be presented to the Board.

COMMUNITY ENGAGEMENT

Bond Planning

BPO 2 - Strategy Meeting - Internal	Internal meeting to discuss strategy and approach for bond planning process and potential projects
BPO 2 - Strategy Meeting - Client	Bond planning kick off discussions to discuss process, timeline, potential projects, citizens committee approach and survey
BPO 2 - Research/Due Diligence	Review district finances, demographics, bond history, communications, local politics
BPO 2 - Committee Formation Materials	Develop committee charge, agendas, meeting agendas, invitation and questionnaire based on strategy discussed with client
BPO 2 - Hire Survey Consultant	Gather proposals from survey vendors, discuss options and parameters with client. Provide overview to Board if needed.
BPO 2 - Develop Survey Questionnaire	Work directly with survey company to develop questionnaire. Review drafts with client and make edits with survey company to achieve final questionnaire for survey fielding. Determine survey parameters with client and provide parent list to survey company.
BPO 2 - Analyze Survey Results	Review and study results of community survey provided by third-party survey company. Draw conclusions on potential projects, bond amounts, favorability of district, messaging for various audiences.
BPO 2 - Meeting 1 Prep	Prepare citizens committee meeting 1 presentation and materials. Meet with client to prepare.
BPO 2 - Meeting 1	Attend committee meeting 1. Present and facilitate meeting items as determined by client. Potential meeting items include: Introductions; Overview of the Committee, Process & Schedule; State of the District; Bond History; Bond Planning Process Overview; Campus Tour
BPO 2 - Meeting 1 Documentation/Debrief	Debrief meeting with client; discuss next steps. Complete meeting notes and post final materials to website.
BPO 2 - Meeting 2 Prep	Prepare citizens committee meeting 2 presentation and materials. Meet with client to prepare.
BPO 2 - Meeting 2	Attend committee meeting 2. Present and facilitate meeting items as determined by client. Potential meeting items include: Demographic Projections/ Capacity & Utilization Analysis; Facility Assessment Overview; Financial Overview; Campus Tour
BPO 2 - Meeting 2 Documentation/Debrief	Debrief meeting with client; discuss next steps. Complete meeting notes and finalize materials for distribution/posting.
BPO 2 - Meeting 3 Prep	Prepare citizens committee meeting 3 presentation and materials. Meet with client to prepare.
BPO 2 - Meeting 3	Attend committee meeting 3. Present and facilitate meeting items as determined by client. Potential meeting items include: Define Consensus; Departmental

	Presentations; Potential Projects; Bonding Capacity; Survey Results; Campus Tour
BPO 2 - Meeting 3 Documentation/Debrief	Debrief meeting with client; discuss next steps. Complete meeting notes and finalize materials for distribution/posting.
BPO 2 - Meeting 4 Prep	Prepare citizens committee meeting 4 presentation and materials. Meet with client to prepare.
BPO 2 - Meeting 4	Attend committee meeting 4. Present and facilitate meeting items as determined by client. Potential meeting items include: Building a Total Project Budget; Project Prioritization; Campus Tour
BPO 2 - Meeting 4 Documentation/Debrief	Debrief meeting with client; discuss next steps. Complete meeting notes and finalize materials for distribution/posting.
BPO 2 - Meeting 5 Prep	Prepare citizens committee meeting 5 presentation and materials. Meet with client to prepare.
BPO 2 - Meeting 5	Attend committee meeting 5. Present and facilitate meeting items as determined by client. Potential meeting items include: Final Prioritization, Consensus on Recommendation; Next Steps
BPO 2 - Meeting 5 Documentation/Debrief	Debrief meeting with client; discuss next steps. Complete meeting notes and finalize materials for distribution/posting.
BPO 2 - Complete Voter Analysis	Analyze district's registered voter demographics and historical turnout
BPO 2 - Committee Recommendations	Develop Recommendations Presentation; Prepare committee spokespersons; attend Board meeting
BPO 2 - Board Workshop	Workshop meeting for Board members to further discuss potential bond; ask questions regarding projects.
BPO 2 - Election Laws & Ethics Training and Materials	Provide training to Board of Trustees and Administration on laws and ethics of school bond elections
BPO 2 - Bond Call Prep	Work with financial advisor and bond counsel to prepare election order (ballot language determine polling locations; final financial implications); begin to develop messaging, branding and strategy.
BPO 2 - Call Election	Attend board meeting and be available for questions
Bond Campaign	
BCO 2 - Bond Campaign Timeline and Strategy Development	Develop timeline of district's bond communications efforts with identified tactics
BCO 2 - Campaign Coordination Meetings	Ensure successful implementation of campaign timeline, discuss and review deliverables, respond to questions and concerns, assist with ongoing strategy (typically every-other-week)
BCO 2 - Bond Logo & Branding Development	Develop unique logo, colors and graphical elements for election materials
BCO 2 - Key Messaging Development	Write key campaign messaging for concise and consistent talking points and content for campaign materials
BCO 2 - Bond Call Communications	Prepare initial campaign communications to launch following board action

BCO 2 - Bond Website Development and Maintenance	Develop unique url hosted through an online platform to serve as designated location for bond information. Includes a breakdown of proposed projects, background information, the planning process, tax information, voting information, frequently asked questions. Huckabee will maintain throughout the bond campaign and keep active for one-calendar year.
BCO 2 - Quick Facts Development	Develop concise bond overview handout for distribution
BCO 2 - Bond Presentation Development	Develop PowerPoint for district spokespersons to use at staff meetings, community meetings and other bond presentations throughout the campaign. Advise spokespersons on talking points and presentation schedule.
BCO 2 - Campus Communications Strategy	Develop campus messaging and deliverables to communicate bond projects specific to each campus
BCO 2 - Develop Project Boards	Design bond project display boards for placement at campuses and around district as visual advertisement on bond
BCO 2 - Direct Mail	Strategy on format, content and targets; produce designs and mailing lists
BCO 2 - Voter Analysis & Tracking	Develop dashboard, request lists from county, process/analyze daily early voting rosters, provide updates to client
BCO 2 - Miscellaneous Campaign Management	Updating schedule, answering FAQs, social media/media monitoring, voter identification, responding to requests