



**Great Schools. Great Community.**

**Bond 2017 – Spring Branch ISD**

*\$898.4 Million Bond Program: 80 Percent Voter Approval*

**NSPRA GOLD MEDALLION AWARD ENTRY**

**March 2018**

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Number of PR/Communications Staff: 5

School District Over 25,000 Students

ENTRY CATEGORY: Bond/Finance Campaign

*Please consider this entry for a Golden Achievement Award*

## SYNOPSIS

Spring Branch Independent School District (SBISD) Trustees called an \$898.4 million bond election on August 21, 2017. Five days later, Hurricane Harvey hit Houston, leaving devastation in its wake – with 1,000+ SBISD families displaced, whole neighborhoods under water, schools and offices closed for two weeks, and district leaders questioning our go-forward strategy.

With no playbook to follow, ballot language that could not be retracted, and hard decisions to make, trustees, district leaders and our communications team ultimately concurred: The district would remain silent on the proposed bond until October 1, then run a focused one-month campaign. Though this decision necessitated significant adjustments, our plan remained solid and aligned to best practices.

**Research:** Targeted research began with a 2015 white paper review of our 2007 bond program. Facilities, financial capability and demographic studies and a communications audit followed; and the 2007 Bond Oversight Committee affirmed a new bond was warranted to address additional aging facilities. The Bond Advisory Committee’s work concluded in June 2017 with guidance that any bond package be under \$1 billion, with no tax rate increase. A July 2017 telephone survey identified voter sentiments and recommendations to move a large block of undecided voters to “yes.”

**Analysis/Planning:** Trustees met weekly through August to develop the bond package. Following each meeting and continuing throughout the fall, our Bond Communications Committee met to hone our message, materials, key stakeholders and calendar. Trustee/senior staff presentation trainings ensured a consistent message and aligned responses to difficult questions.

**Communication/Implementation:** SBISD implemented a tight, multi-layered information campaign with traditional and new tactics, emphasizing targeted faculty and community presentations, robust web and social media, a school-lobby poster campaign, comprehensive social media, and mailers.

**Evaluation:** While Harvey changed the face of our community, it did not change our community’s resolve to support our schools. ***With 80 percent voter approval, SBISD passed an \$898.4 million bond package, the largest in district history, and seventh largest school bond ever in the State of Texas.***

## SUMMARY

### *An Overview*

[Spring Branch Independent School District](#) (SBISD) is located 12 miles west of downtown Houston and serves a highly diverse student body, both ethnically and economically. For many, SBISD has been the family home for several generations and is considered “a small town in the big city.” A landlocked 44 square-mile district with 46 campuses, 8 support facilities and 4 athletic complexes, enrollment trended upward in recent years, stabilizing at around 35,000 students. Unlike our fast-growth suburban neighbors, bond dollars must address aging facilities as demographic studies project minimal change to the size of our student body in the decade ahead.

In 2007, voters approved a \$597.1 million, 10-year bond package by a 60 percent margin of victory, despite organized opposition, including elected officials who opposed the related tax increase. The [2007 Bond](#), for which planners identified nearly \$1 billion in need, began the district’s transformation, with a priority on rebuilding elementary schools. Taking advantage of the nation’s economic downturn, we sped up timelines, built two additional schools with the savings, and still completed the 2007 Bond on time and under budget.

Fast-forward 10 years to Aug. 21, 2017. It was a big day in SBISD. Not only was it the first day of the 2017-18 school year, but students and teachers had a rare learning opportunity during a total eclipse of the sun that afternoon. Later that evening, the Board of Trustees called for an [\\$898.4 million bond election](#) on November 7. After several years of studies, meetings, and planning, a bond package was ready to be presented to the public.

The package would rebuild the nine remaining oldest elementary schools and one middle school, continuing work from the successful 2007 Bond. It would substantially rebuild one of the district’s oldest high school buildings, add a classroom wing at another, replace the auditorium at another, and renovate the cafeteria/library areas of yet another. It would add a classroom wing at an overcrowded elementary school. The bond package would update safety and security, building systems and technology at all campuses. It would replace aged CTE classroom equipment, musical instruments and uniforms, and school buses. The four comprehensive high schools would each get a turf field.

It was ambitious but necessary work, prioritized from \$1.4 billion of facilities needs. The SBISD Communications Team was tasked with one priority goal: develop and implement a comprehensive communications plan, including the messaging, materials, strategies and tactics to assure a win at the polls on November 7.

## RESEARCH

Knowing the 2007 Bond did not address all our needs, we began planning for our next bond as soon as that one passed. As more than 80 percent of our voters do not have children in our schools, SBISD fosters strong community engagement to keep our stakeholders informed and engaged. For example, the nearly 100 staff and community members who had participated in the development and oversight of the 2007 Bond came together in Spring 2015 to share their views on the 2007 Bond. The resulting white paper helped us know what to keep and what to improve as we faced the possibility of a new bond soon. Programs like our [STAR Card](#), providing senior citizens free admission to sports and theatre productions, and intentionally growing [partnerships and volunteers](#) (currently over 11,000, up from 8,500 in 2008) help us stay connected, aware and informed of our community’s opinions about the district.

Despite positive sentiments about the 2007 Bond, and an average construction year of 1962 for facilities not rebuilt under that program, we faced new hurdles this time. While financial analysis affirmed nearly \$1.2 billion

in new debt capacity without raising taxes, a [telephone survey of 500 registered voters](#) conducted by [Robert Stein of Rice University](#) in July 2017, just after the Bond Advisory Committee presented its recommendations to the board, told a different tale from his polling a decade earlier. In 2007, polling affirmed support by a margin of 53 percent to 30 percent with 11 percent undecided. In 2017, 47 percent affirmed support, with a large (37 percent) group of undecided voters. We had our work cut out for us!

Dr. Stein's polling also affirmed our community was well-versed in Texas public school finance. As a "Robin Hood" district, SBISD, as well as local grassroots community groups, have spent nearly a decade strategically raising awareness about the dire impact of our state's funding model on our [general fund budget](#). This year, \$75 million, or 24 percent, of our locally-generated general fund tax collections will be sent to the state.

Survey results illuminated several communications challenges and opportunities we would have to address. First, we would have to clearly explain the difference between bond and general funds – bond funds all stay locally, not subject to the state's "recapture" – a fact polling showed increased likelihood of bond support. We would also have to assure our community of the prudence of a nearly \$900 million ask on the bond side of our tax rate, when our general fund remains challenged. Additionally, the telephone survey revealed that 71 percent of voters viewed district facilities as "excellent" or "good." While favorable in some ways, this perception was not accurate based on findings of our facilities condition study and could negatively impact election outcomes.

Also identified as critical positive messages to increase support were the district's track record of success and strong fiscal management of the 2007 Bond.

Our research affirmed additional challenges (identified pre-Harvey) that we would need to address in our communications plan, including:

- Lack of patron understanding around debt capacity, how bonds work, and how the district could assume nearly \$900 million in new debt without a tax increase
- Ongoing gentrification of neighborhoods, with new residents not having long-standing history with SBISD
- No real local media presence, due to the recent sale of our community newspaper to the *Houston Chronicle*, which connected our bond with that of a fast-growth suburban district in a story on August 22 (the day after calling the election) and featured a photo of the other district's controversial \$70 million football stadium. Our [only local story](#) ran before the board approved the final package.
- Potentially confusing yet required ballot language included the words "and the levying of a tax in payment thereof," implying to an uneducated voter a tax increase when no tax increase was planned
- Sharing the ballot with the City of Houston's \$1 billion in pension obligation bonds and \$495 million in general obligation bonds, with opponents of one or more of those bond proposals lumping all "bonds" together in their messaging – and ours was last on the ballot
- The requirement in Harris County that all bond print/web materials be available in four languages

## ANALYSIS/PLANNING

Having received [recommendations](#) from our Bond Advisory Committee in late June 2017, trustees met weekly through the summer to develop the final bond package. Our Bond Communications Committee, including Superintendent Muri; three trustees, including the board president; Karen Wilson, chief financial officer; Jennifer Blaine, associate superintendent for talent and operations; and Travis Stanford, director of planning and construction, met the morning after each of these meetings. From time-to-time, a communication consultant joined us to provide feedback. We worked weekly to strategically hone our messaging, develop our branding,

identify key stakeholders, receive feedback on collateral materials and presentation decks and refine our communications calendar. The committee developed the “Great Schools. Great Communities.” branding, which while separate, aligns with district branding through the aspirational star watermark.

We also identified priority messages. At the highest level, these included:

- The \$898.4 million bond package is the result of a two-year, research-based process involving over 100 stakeholders and unanimously approved by the Board of Trustees
- Projects touch every child and every campus, based on identified needs
- There will be no tax rate increase, and there will be no effect on the tax bill or amount of taxes paid for anyone disabled, or 65 or older with a homestead exemption
- Bond funds are Robin-Hood proof
- SBISD is a good steward of taxpayer money. The 2007 Bond was completed on time and under budget

To identify key audiences, the Community Relations and Communications teams compiled a spreadsheet of nearly 150 elected officials, parent and community leaders, partners, former trustees and civic leaders who needed personal outreach from Dr. Muri or a trustee. Dr. Muri and trustees identified who would be best to reach each individual/group, and whether a phone call, meeting or presentation was best. Also identified were priority faculties and PTAs of schools receiving a rebuild or major renovation and civic groups for whom presentations were warranted.

An engagement calendar was developed and maintained in the superintendent’s office. The expectation was for Dr. Muri and at least one trustee to lead each community meeting, with Dr. Muri presenting the information campaign and trustees delivering the advocacy message district personnel could not. In attendance at every meeting were Communications team representatives and most often Dr. Blaine and Mr. Stanford.

Separate from the district, key community leaders, many of whom had served on the Long Range Facilities and/or Bond Advisory Committee, formed a Vote YES Spring Branch ISD Bond Election citizens committee. This group focused on advocacy, and ran its own separate Vote Yes campaign complete with yard signs, mailers and other collateral material.

Communications vehicles were selected based on findings of our 2017 communications audit, a review of 2007 bond program materials and the need to reach both a large active voting block of senior citizens as well as a younger population of parents and community members who rely on social media for information. All publications were reviewed by bond counsel.

After Harvey hit, we regrouped and recast our messages. Harvey-specific messages were added into the animated video, slide decks and district messaging. Trustees stayed in contact with those most affected by Harvey and helped craft updated messaging, which included these additional messages:

- New financial models run post-Harvey to assess potential impact of reduced property values confirmed SBISD could still meet the obligations of the proposed package with no tax rate increase
- Needs have not changed, and were identified over a two-year period of research and engagement
- We will proceed thoughtfully, with sensitivity to the needs of the community
- Voter approval authorizes the district to sell bonds but does not obligate the district to a schedule in which to do so
- Once called, there is no legal mechanism to remove the bond from the ballot

Our expenditures of just under \$94,000 included:

Item	Description	Amount
Posters	84 "How Will the 2017 Bond Impact My School?," Early Voting, and Bond Summary Posters, (36x48) customized for lobby display at every school and district facility	\$3,154
Fast Facts Brochures	3,500 large and 7,500 small <i>Fast Facts</i> Brochures size, for display in all district facility lobbies and for handout at community meetings/school events	7,278
One Pagers	5,750 handouts of the "How Will the 2017 Bond Impact My School?" customized for every school and facility lobby and for handout at community meetings	492
Mailer	Cost for printing, stuffing and postage for mailer to 33,000 registered voters (brochure, letter, two-page FAQ)	38,796
Animated Video	Animated Video development and production	6,000
Telephone Survey	Cost to Conduct, Analyze and Present Bond-Related Telephone Survey of 500 Registered Voters	37,798
Total		\$93,518

## COMMUNICATE/IMPLEMENT

As noted above, communications planning had been ongoing from the start of the process but ramped up significantly during the summer months when trustees were meeting weekly. Initial messages had been crafted and plans were in place to start the information campaign in earnest on September 5, after Labor Day when fall campaign seasons traditionally begin.

But along came [Hurricane Harvey](#). During a Thursday, August 24, training session where communications staffers were grilling the superintendent, trustees and senior staff members with difficult questions about the bond package, weather alerts became more frequent until demanding full attention. District officials cancelled school the following day, Friday, August 25, to get ready for Harvey and his record rainfall beginning the evening of Saturday, August 26, and changing everything. By early the following week a portion of the district was under water, many if not most from the unprecedented release from two large reservoirs just west of Spring Branch ISD. Our school buildings fared well during the storm but our community was hurting.

Classes and district operations were cancelled for 10 days because of Harvey, with students not returning until Monday, September 11. All district efforts during that time focused on flood relief for our community, our families and our staff. No one could focus specifically on the bond proposal during that time or the first week back. But then came crunch time. How do we handle this bond election that has already been called? A [board workshop](#) on September 18 focused on the bond post-Harvey, including feedback from bond counsel and financial consultants, who confirmed that there is no legal mechanism to remove a called election from a ballot.

That meant that the campaign was on. We could not let an \$898.4 million bond proposal sit on the ballot with no explanation, on a ballot that included mostly bond proposals – some controversial – from the city of Houston, which encompasses the majority of our district. The decision was made to proceed with the campaign, beginning October 1. That "quiet period" would allow the community some breathing room to continue with recovery from Harvey. (NOTE: Recovery from Harvey continues even now, but the damage and emotions were especially fresh then. The quiet period was out of respect for the community, particularly those hardest hit in the western end of our district.)

The pause also allowed the communications team to update materials in which Harvey messages were needed and then to distribute collateral materials to campuses for that October 1 push. We had a [website](#) ready to go. We delivered [site-specific posters](#) that specified work to be done at that site if the bond passed. [One-page](#)

[versions](#) were posted on the bond website and placed in each site's lobby. We added a Harvey opener to our [animated video](#) developed by an outside vendor that explained the proposed bond program. We fine-tuned the [PowerPoint presentation](#) that the superintendent and trustees used in community presentations, building in the ability to adapt the presentation as needed to highlight work that would be done at a particular campus or in a particular attendance zone, depending on the audience.

To dispel the perception that the proposed bond program favored one area of the district over another, an [interactive map](#) was created that clearly showed the work done during the 2007 Bond and the work that would be done if the new bond passed.

During that time, the superintendent was calling local elected officials and other key community figures to talk about the bond package, getting their support early on. When trustees learned they could ask the appraisal district to [reappraise properties](#) damaged by Harvey, they did so by unanimous vote during a special meeting. A good-faith gesture, the move not only mollified but so impressed a key local legislator that he used the information in [press releases](#) encouraging other entities to reappraise damaged properties. A special [STAR News](#) went out to our senior citizens, traditionally a group that votes. A luncheon for local real estate agents and brokers was well-attended and generated interest and excitement around the bond.

Letters for key stakeholder groups were written and mailed, strategically timed to hit mailboxes just prior to early voting. Principals were asked to encourage staff first to register and then to vote. High school principals were asked to encourage eligible students to register and to vote. Several email blasts to the community encouraged registration and voting. Texas has a two-week early voting period prior to an election, and reminders were posted both through email and social media. Staff produced a strategic calendar of [daily tweets](#) that included snippets of the bond proposal, district facts, and voter registration and voting reminders.

We produced [several videos](#) featuring the superintendent that described the proposed bond and that encouraged people to register to vote, then to vote. We developed a lengthy [FAQ](#) that lived online. A dynamic document, we constantly added to the FAQ as new questions arose. We also included the 20 top questions in a mailer to registered voters that also included a small brochure and a letter from the superintendent.

We created and constantly refined talking points, both about the district and the bond. Those talking points were integrated into all our presentations and collateral and provided to campus leaders. The talking points were brief, concise and informative, and distilled and lifted out the best of our district and the bond package.

We crafted [press releases](#) to announce the calling of the bond election, and to announce the results. In response to feedback, we also developed personalized letters for each campus to email to their specific communities identifying the work that would happen along their entire feeder pattern.

Ultimately in our short one-month campaign, 36 community presentations were made; 33,001 mailers were sent; 32 district-level tweets were sent in addition to countless tweets and retweets by Dr. Muri, trustees, district leaders and community; and seven videos were produced to achieve the most successful bond election in district history.

## **EVALUATION**

The 2017 bond package passed by a margin of 80 percent, with nearly 14 percent voter turnout, compared to nearly 7 percent in Harris County. The bond passed in 45 of 46 precincts, defeated in one by a 3-2 vote in a 31-voter precinct. The 80 percent margin far surpassed our goal of 60 percent achieved in the 2007 bond,

confirming our community sees the bond issue as an investment in its future and trusts the district's financial stewardship and ability to keep its promises, key messages throughout the information campaign. The 80 percent approval also confirmed what polling told us – that our community understands Texas public school finance better than most. Bond dollars are not subject to being sent to the state like SBISD's general fund revenue, and the community responded to that. The polling also told us that our favorables were far stronger than negatives and was borne out by the results.

The 2017 bond proposal drew no organized opposition. By comparison, the \$597.1 million 2007 bond issue – at the time the largest in district history – passed by 60 percent with slightly larger voter turnout. That bond faced vocal opposition from a local elected official as well as some organized opposition. That same official not only stayed quiet during the 2017 bond election but praised SBISD for reappraising properties damaged by Harvey.

The bond campaign connected the superintendent with a number of groups, including school communities, service organizations, homeowner associations and super neighborhood groups. The audiences were interested in the bond but frequently used the opportunity to ask other questions about the district. The meetings also generated excitement about the bond with key stakeholders.

Though the bond passed by a record margin, the communications team felt a self-reflective session would provide lessons learned for future bond elections. The team and Dr. Muri participated in a Retrospect review, a process that captures team-based learning from an important project and turns that into a knowledge resource. District staff trained in Retrospect conducted the review.

One area of identified concern was the lower than expected turnout for employees who live in the district. Despite several attempts encouraging eligible employees to vote, we felt the numbers were far too low for those who have a vested interest in the system and recommend a more aggressive employee campaign for future bonds.

The district continues to engage the community post-election. Project planning began immediately after the election with many items soon to be taken to the Board of Trustees for approval. A [Bond Oversight Committee](#), a community-based group co-chaired by two district parents and charged with holding the district accountable to the bond promises, had its first meeting in February.

In sum, the Spring Branch ISD community has a long history of supporting its children and its schools, and that support continues with the passage of the \$898.4 million bond package, the seventh-largest in Texas school bond history. The 10-year program, on the heels of the successful 2007 bond program, continues the transformation of the district well into the 21<sup>st</sup> century. And an 80 percent approval rate shows the community's confidence that the school district can deliver on its promises.

Finally, while we are not sure what impact it may or may not have had on the bond election, it is worth noting that the [Houston Astros](#), Houston's major league baseball team, not only made but won the World Series for the first time during a two-week run in late October – during early voting. We are not sure much attention was paid to our bond messaging during that run – the Astros were literally the talk of the town. Yet the euphoria of winning a championship permeated Houston, Spring Branch, and the entire region, when we needed one most. We likely will never know the impact but we are all hoping for a repeat.

# Research

## 2017 Spring Branch ISD Bond Election Survey

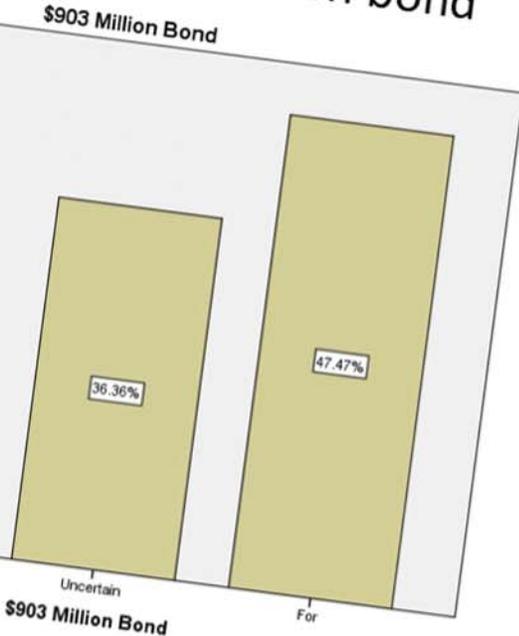
Robert M. Stein  
Rice University

Annie Stein  
Houston, Texas

### Survey Methodology

- Survey instrument developed in consultation with district's administration
- 500 live telephone interviews with registered voters between July 17 and July 28, 2017
- 32% of completed interviews conducted on cell phones, 68% of completed interviews conducted on landline phones
- Interviews conducted by Customer Research International of San Marcos, Texas
- Error rate for this survey is +/- 4.5%

#### for \$903 million bond



#### District voters are older



#### Confidence in SBISD to make sound financial decisions



#### District voters don't have attending SBISD



# Research



## Future Bond Capacity

### ***Assumptions:***

- I&S Tax Rate: \$0.3045/\$100
- Taxable Value of the District for 2017-18: \$32.4 billion
- Growth Rate: 3% through 2020-21
- Tax Collections Rate: 98.5%
- Bond Interest Rate: 4.5%
- Capital Replacement Program: 2 pennies per year for 10 years will fund approximately \$53 million in short average life assets

# Research

AECOM

## Spring Branch Independent School District LONG RANGE FACILITIES PLAN - LEVEL 1

May 2017



# Analysis/Planning

## Sample Communication Committee Agenda Superintendent Community Meeting Schedule

### Bond Communications Meeting #12 Wednesday, November 1, 2017 Agenda

- Marquee Request for Monday and Tuesday
  - Vote SBISD Bond
  - Tues., 11.7
- Based on outcome – new marquee message on Wed.
- Communications Plan Remaining Days
  - Wed., Nov. 1 PTA's – MDE, MHS, Sherwood /Principals
  - Thurs., Nov 2 Scott video (shot with Class of 2030 Pre -K Kids) Message: Early Voting ends Friday
  - Mon., Nov. 6 Marquee updates: SBISD Bond Vote Tues. Nov 7
  - Mon., Nov. 6 Scott email to community/parents and evening call out to all SBISD parents (email include link to precinct locations)
  - Tues., Nov. 7 Morning -- Don't forget to vote email/social
  - Tues. or Wed. Evening (if data is available at reasonable hour)-- Press Release /Letter from Superintendent
- Employee Message Today?
- PTA/Principal Message (See attached sample – do we want principals to send?)
- Press Release Draft Review
- Tuesday Evening Plans
- Bond Oversight Committee—Review of 2007 Charge and Composition

### Scott Muri Meetings Related to Bond Election – Fall 2017 (Meetings are coded in Purple on Scott's calendar.)

Appointment (Date)	Group/Event	Location	Trustee
	PTA meeting	Memorial Church of Christ	Karen Josef
	PTA meeting	Spring Branch Middle School – in the Library	NA
	PTA meeting	Memorial Dr. Elem. School	Karen Pam CANCELLED
	PTA meeting	Memorial Middle School	Katherine Pam CANCELLED
	PTA meeting	Spring Branch Middle School – in the Auditorium	Pam
	PTA meeting	Spring Forest Middle School – in the Auditorium	Pam Chris V.
	Cornerstone Academy PTA General Meeting	Cornerstone Academy – in the Auditorium	Katherine Carter
	Spring Branch Area Retired School	Admin Bldg.	Pam

Mtg starts 6:30. Present 7:00 for 15 to 20 minutes.			
Oct. 3, 2017 6:30-7:00 PM	Cornerstone Academy PTA General Meeting	Cornerstone Academy – in the Auditorium	Katherine Carter
(only 20 minutes available at this meeting)			
7:00 second meeting for Spanish-speaking parents			
Oct. 4, 2017	Spring Branch Area Retired School	Admin Bldg.	Pam

11:00-11:30 AM	Employees (retired)			
Oct. 4, 2017 5:30-6:00 PM	Nottingham Elementary			
	Note: Scott and Karen will be present at this meeting. A meeting for the fall will be scheduled for a later date.			
Oct. 5, 2017 10:00-11:30 AM	Spring Branch Council of PTAs meeting (Bond presentation and Q&A at 10:30-11:30)	Admin Bldg. Room 275	Karen Chris V.	
	Note: Katherine and Chris V. are members of this group.			
Oct. 5, 2017 7:00 PM	Spring Branch Super neighborhood Central (requested by Rusty Graham)	VFW Post 8790 1560 Foley Houston 77055	Pam	Yes
Oct. 6, 2017 10:15 AM	Bunker Hill Elementary PTA meeting	Bunker Hill Elem. School – in the Community Center.	Josef Katherine	Yes
	Note: This school asks that in addition to bringing the PPT on you laptop, to also bring it on a flash drive as backup.			
Oct. 9, 2017 4:00-5:00 PM	First quarterly meeting with officers of teacher groups: ATPE, AFT, SBEA	Admin Bldg. Superintendent's Conference Room	Board member attendance is not required at this meeting.	N/A



# Analysis/Planning

## POINTS OF INFORMATION 10.1.17



- **\$898.4 mm Bond Package:**
  - Unanimously approved by Trustees on 8.21.17
  - Followed the work of a long range facilities committee and bond advisory committee comprised of parents, retirees, teachers, students, business reps and community members
  - Research based studies and facility assessments identified \$1.4 billion in facility needs.
  - Average year built for our remaining oldest elementary schools is 1962.
  - Most of our schools were built nearly 50 years ago.
- **The bond proposal, if approved by our voters, will impact every school and Every Child in SBISD as follows:**
  - Replace remaining 9 oldest elementary schools and 1 middle school (listed below\*)
  - Add new classroom building at MHS and at NHS, replace auditorium at SHS and renovate cafeteria/library at SWHS
  - Add a classroom wing at Cedar Brook Elementary
  - Upgrade safety and security, building systems and technology at all campuses, including classroom furniture for secondary schools
  - Replace Career and Technical Education classroom equipment
  - Replace aged music instruments and uniforms
  - Upgrade athletics, including 4 turf fields (MHS, NHS, SHS, and SWHS)
  - Replace older buses
- **Finances:**
  - No tax rate increase expected as a result of this bond election
  - No tax bill increase for 65 and older
  - All funds stay in SBISD- not subject to recapture
  - Conservative based on sound financial management of bond funds which we control locally
  - Bonds are sold over time as projects come online and funds are needed
  - Shorter term bonds for shorter-lived assets ; Inflation is built into total project costs
  - Third lowest tax burden in Houston area
  - Even after issuance of the \$898.4 mm, if approved by voters, SBISD will still be 40% below the amount of debt that would be considered high (\$.50/100).
  - Award winning financial management
- **Why No Tax Rate Increase Needed?**
  - In planning for the 2007 bond, the district was conservative in estimating taxable values and has been paying down debt principal.
  - We began financial planning for this bond just after the 2007 bond passed, knowing we had close to \$1 billion in identified needs, and were not able to address them all at that time.
  - Revenues to fund bond payments are a function of tax rates and property values, and are based on tax collections.
  - Over time, as taxable values increase, the capacity to pay debt increases without increasing the tax rate.
  - Current debt – approximately \$600 mm;
  - Annual debt payments most recently about \$91 million of which about \$59 mm was paid to principal, \$32 mm to interest.
  - We have been paying down principal.
  - Our conservative model for 2017 assumes value increases in only 3 of the 10 years of the plan

# Analysis/Planning

## POINTS OF INFORMATION 10.1.17

- **Every Child. Every Campus. Based on Identified Needs.**
  - Completes transformation of elementary schools begun under 2007 bond with rebuilding of 9 remaining oldest elementary schools- oldest built in 1949
  - Three elementary schools built in 1990s are addressed – including classroom addition at CBE
  - Begin transformation of secondary schools- rebuild Landrum
  - Facility and athletic improvements (turf fields) at all four comprehensive high schools.
  - All other secondary schools receive new classroom furniture; system, safety and security and technology upgrades, and athletics upgrades based on campus needs (i.e. resurfacing tracks and tennis courts)
  - CTE and fine/performing arts upgrades/refresh.
  - Planning allocation is included to study CTE and make recommendations for long term programming in that area.
- **2007 Bond – On Time. Under Budget.**
  - Smart strategic fiscal and project management enabled the district to complete the 2007 bond program on time and under budget- we were able to rebuild a thirteenth elementary and significant update at SBEC.
  - Last to first technology
  - Major safety and security upgrades
- **Post Harvey**
  - Financial Advisors ran new models post-Harvey that confirm that we can meet the obligations of the proposed package with no tax rate increase
  - Needs have not changed, and were identified over a 2-year period of research, assessment and community engagement.
  - We will proceed thoughtfully and with sensitivity to the needs of our community
  - Voter approval authorizes the district to sell bonds for construction and purchases but does not obligate the district to a schedule to do so. This can be done as slowly or quickly as necessary.
  - Once called, there is no legal mechanism to remove the bond from the ballot.
- **Election Information**
  - Last day to register to vote: Oct. 10
  - Early Voting: Oct 23 – Nov 3
  - Early Voting sites: <https://www.springbranchisd.com/bond2017/votinglocations.pdf>
    - Two sites within SBISD (46 around the county)
      - Trini Mendelhall Community Center, 1414 Wirt, 77055
      - Nottingham Park, 926 Country Place Dr. 77079
  - SBISD Bond is LAST item on all ballots.
  - Election Day: Tuesday, Nov 7

### The Proposed Bond Package

Proposed Scope	Recommended
FACILITIES	\$796,300,000
CAREER & TECHNICAL EDUCATION	\$ 10,000,000
FINE & PERFORMING ARTS	\$ 3,000,000
TECHNOLOGY	\$ 60,100,000
TRANSPORTATION	\$ 13,000,000
BOND PLAN ADMINISTRATION	\$ 16,000,000
<b>Grand Total</b>	<b>\$898,400,000</b>

# Communicate/Implement

**SBISD**  
Proposed Bond Package  
for Spring Branch ISD Schools

Dear SBISD Families and Community Members,

As you hopefully know, on Aug. 21, the Spring Branch ISD Board of Trustees held a public hearing on the proposed \$898.4 million bond election to be on the Nov. 7 ballot. Five days later, voters will be asked to vote on the proposed bond election. We know some of you have been impacted by flooding in your community, and our thoughts and prayers remain with you.

On Sept. 14, our financial advisors and bond counsel presented a preliminary report to the Board of Trustees. Based on their conservative projections, SBISD can afford the obligations of our proposed bond package with an expected tax rate increase for our voters. Our bond counsel affirmed that there is no process to remove an item from the ballot.

The district's long-term needs identified over a nearly 10-year period have not changed as a result of the bond. At the same time, they are prioritizing flexibility in implementation of the bond, should it be passed, to be sensitive to the needs of our community as it rebuilds in the aftermath of the flooding.

The district has largely remained silent about the proposed bond package for several weeks out of respect to our community in the aftermath of the flooding. Today, we will move forward with our communications plan to inform you about the proposed bond package.

The bond proposal, if approved by our voters, will impact every school in SBISD as follows:

- Replace remaining 9 oldest elementary schools and 1 middle school in SBISD as follows:
  - Replace remaining 9 oldest elementary schools and 1 middle school in SBISD as follows:
- Add new classroom building at MHS and at NHS, replace auditorium at SHS and renovate cafeteria/library at SWHS
- Add a classroom wing at Cedar Brook Elementary
- Upgrade safety and security, building systems and technology including classroom furniture for secondary schools
- Replace Career and Technical Education classroom equipment
- Replace aged musical instruments and uniforms
- Upgrade athletics, including 4 turf fields (MHS, NHS, SHS, SWHS)
- Replace older buses

To learn more about the proposed 2017 Bond Package, please visit [www.springbranchisd.com/bond](http://www.springbranchisd.com/bond).

Click [here](#) to view the district's press release. More information about the proposed bond package and the proposed impact for every SBISD campus will be forthcoming soon via the district website and materials provided at each school. Questions may be directed to [bond@springbranchisd.com](mailto:bond@springbranchisd.com)

On behalf of our Board of Trustees and our 4,600 employees, we wish each of your families and your children a great and successful school year. Thank you for choosing SBISD.

Scott R. Muri, Ed.D.  
Superintendent of Schools

2017 Bond Package Schools to be Rebuilt:  
Elementary

**SBISD**  
SUPERINTENDENT OF SCHOOLS  
**SCOTT R. MURI, Ed.D.**



Dear SBISD Families and Community Members,

Welcome back! Yesterday, as I traveled around the district, I saw lots of smiling faces, children excited to be reunited with their friends and teachers, and SBISD teachers and staff ready and excited for a great year ahead. The afternoon saw thousands of curious children with special glasses or cardboard pinhole viewers head outside to experience the thrill of the eclipse.

As we ended the first day of the new school year, the SBISD Board of Trustees held their August Regular Board Meeting and unanimously voted to call an \$898.4 million bond election for Tuesday, Nov. 7. The bond proposal was developed by Trustees over the summer based on recommendations from a **Bond Advisory Committee**. The district does not expect any tax rate increase as a result of this bond election, if passed by voters.

The bond proposal impacts every school and Every Child in SBISD as follows:

- Replace remaining 9 oldest elementary schools and 1 middle school (listed below\*)
- Add a new classroom building at MHS and at NHS, replace auditorium at SHS and renovate cafeteria/library at SWHS
- Add a classroom wing at Cedar Brook Elementary
- Upgrade safety and security, building systems and technology at all campuses, including classroom furniture for secondary schools
- Replace Career & Technical Education classroom equipment
- Replace aged musical instruments and uniforms
- Upgrade athletics, including 4 turf fields (MHS, NHS, SHS and SWHS)
- Replace older buses

Click [here](#) to view the district's press release. More information about the proposed bond package and the proposed impact for every SBISD campus will be forthcoming soon via the district website and materials provided at each school. Questions may be directed to [bond@springbranchisd.com](mailto:bond@springbranchisd.com)

On behalf of our Board of Trustees and our 4,600 employees, we wish each of your families and your children a great and successful school year. Thank you for choosing SBISD.

Scott R. Muri, Ed.D.  
Superintendent of Schools



# Communicate/Implement

Website  
Brochure  
Slide Deck



## SBISD

- **T-2-4 Goal** – All SBISD graduates will successfully complete a technical certification, military training, or a 2- or 4-year degree.
- SBISD 6-year post-secondary graduation rates exceed region, state and national averages.
- SAT and ACT scores exceed region, state and nation (2016)
- 682 Advanced Placement Scholar Award winners- district record (2017)
- Region IV Teacher of the Year Finalists (2016, 2017)

Great schools. Great community.

**BOND**  
**2017**  
Spring Branch ISD

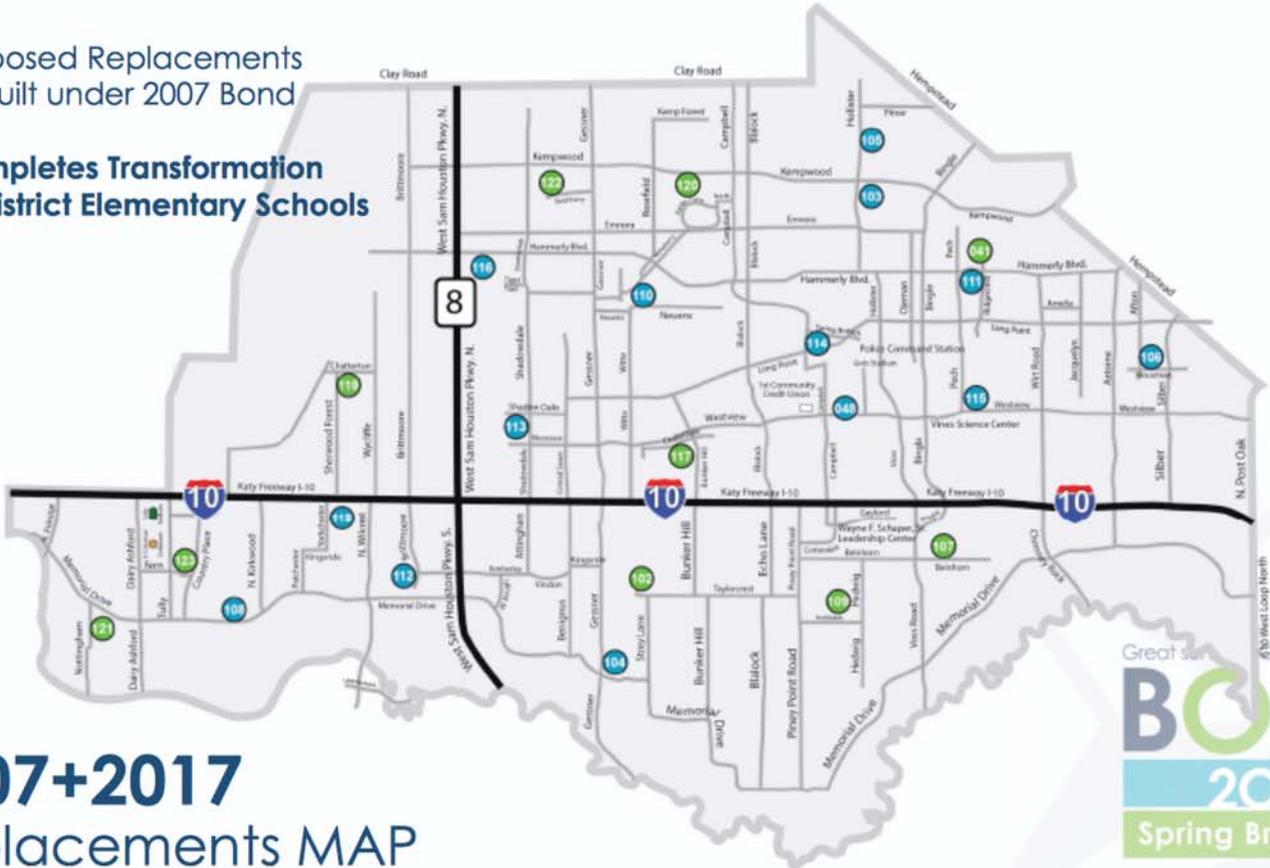
# Communicate/Implement

Great schools. Great community.  
**BOND**  
 2017  
 Spring Branch ISD



- Proposed Replacements
- Rebuilt under 2007 Bond

## Completes Transformation of District Elementary Schools



**2007+2017**  
 Replacements MAP

Great schools. Great community.  
**BOND**  
 2017  
 Spring Branch ISD

# Communicate/Implement

## Inside of Brochure

**Voting Day:**  
Tuesday, Nov. 7

**Early voting:** Oct. 23 - Nov. 3

**Early voting information:**

[www.springbranchisd.com/bond2017/earlyvoting.pdf](http://www.springbranchisd.com/bond2017/earlyvoting.pdf)  
[www.harrisvotes.com](http://www.harrisvotes.com) or 713-755-6965

**Voter registration information:**

[www.hctax.net/Voter/Registration](http://www.hctax.net/Voter/Registration)

**Sample Ballot:**

THE ISSUANCE OF \$898,400,000  
EQUIPMENT OF \$50,000,000

### Facility Projects by Bond Program and Campus

SBISD Bond Program Campus Project Legend

Bond 2007  
Schools Rebuilt

Bond 2017  
Proposed School  
Rebuilds

Bond 2017  
Proposed Building and/or  
Systems Upgrades

Campus Listing by Number:

- Pine Shadows Elementary (110)
- Ridgecrest Elementary (111)
- Rummel Creek Elementary (112)
- Shadow Oaks Elementary (113)
- Sherwood Elementary (119)
- Spring Branch Middle (114)
- Spring Branch Middle (043)
- Spring Forest Middle (045)
- Spring Oaks Middle (046)
- Spring Shadows Elementary (120)
- Spring Woods Middle (044)
- Spring Woods High School (003)
- Spring Woods High School (006)
- Stratford High School (122)
- Terrace Elementary (123)
- Thornwood Elementary (123)
- Tiger Trail School
- Treasure Forest
- Valley Oaks Elementary
- Westchester Elementary
- Westwood Elementary
- Wilchester Elementary
- Woodview Elementary
- Woodview Elementary
- Bunker Hill Elementary (012)
- Hunters Creek Elementary (013)
- Landrum Middle (041)
- Lion Lane School (130)
- Meadow Wood Elementary (108)
- Memorial Middle (042)
- Memorial High School (001)
- Northbrook Middle (047)
- Northbrook High School (005)
- Nottingham Elementary (121)
- Panda Path School (129)



**THE  
FACTS**

[springbranchisd.com/bond2017](http://springbranchisd.com/bond2017)  
Tuesday, Nov. 7  
Nov. 3

### 2007 Bond Program Recap

Spring Branch ISD educates more than 35,000 students and maintains approximately 6 million square feet - or 693 acres - of schools and support facilities. The last bond issue, approved by a margin of 60 percent in 2007, allowed SBISD to finance capital improvement projects district-wide. The recently completed 2007 bond program included the rebuilding of 13 elementary schools and the Spring Branch Education Center. Upgrades to safety and security and major systems were made at every district facility. The program was supported by a community bond oversight committee. **Most remaining campuses not rebuilt are more than 50 years old.**

### The Process

In June 2017, the Board of Trustees received the Bond Advisory Committee's recommendation. The Board conducted a series of special meetings in July and August to discuss the detailed report and to develop a proposed bond package.

On Aug. 21, the Board voted unanimously to call a Bond Election to be held on Tuesday, Nov. 7, 2017.

### Proposed Bond Package

Proposed Scope	Recommended
FACILITIES	\$704,000,000

### 10 Schools to be Rebuilt

- Bunker Hill Elementary
- Hunters Creek Elementary
- Memorial Drive Elementary
- Nottingham Elementary
- Sherwood Elementary
- Spring Shadows Elementary
- Terrace Elementary
- Thornwood Elementary
- Woodview Elementary
- Landrum Middle

### 5 School Renovations/Additions

The following schools will...

# Communicate/Implement

Back of Brochure  
Lobby Posters

**Voting Day:**  
Tuesday, Nov. 7

Early voting: Oct. 23 - Nov. 3

Early voting information:

[www.springbranchisd.com/bond2017/earlyvoting.pdf](http://www.springbranchisd.com/bond2017/earlyvoting.pdf)  
[www.harrisvotes.com](http://www.harrisvotes.com) or 713-755-6965

Voter registration information:

[www.hctax.net/Voter/Registration](http://www.hctax.net/Voter/Registration)

## Sample Ballot:

THE ISSUANCE OF \$898,400,000 BONDS FOR THE CONSTRUCTION, ACQUISITION, EQUIPMENT OF SCHOOL BUILDINGS, INCLUDING REBUILDING NINE ELEMENTARY SCHOOLS AND ONE MIDDLE SCHOOL, THE PURCHASE OF SCHOOL SITES AND SCHOOL BUSES, AND THE LEVYING OF A TAX IN PAYMENT THEREOF

Esta publicacion se puede obtener en Espanol tambien llamar 713-251-2272.

Co the xin ban tieng Viet cua an pham nay bang cach goi so 713-251-2272.

如需中文版，请致电 713-251-2272.



**Spring Branch ISD**

955 Campbell Road, Houston, TX 77040  
Phone 713-464-1511

**SBISD Board of Trustees**

Karen Peck, President  
Josef D. Klam, Vice President  
Chris Gonzalez, Secretary  
J. Carter Breed  
Katherine Dawson  
Pam Goodson  
Chris Vierra

**Superintendent**

Scott R. Muri, Ed.D.

How will the **2017 Bond** impact my school?

**Meadow Wood Elementary**

[www.springbranchisd.com/bond2017](http://www.springbranchisd.com/bond2017)

### Campus Highlights

- Instructional Tools for Students and Staff
- Safety and Security Upgrades
- Building and System Upgrades
- Wireless Modernization
- Communication System Upgrades
- Cabling and District Digital Security Upgrade

**The Meadow Wood campus was replaced as part of the 2007 Bond Program.**

### 2007 Bond Program Highlights of Interest:

- Original opening: 1965
- Reopening: December 2011
- Capacity: 600 students
- Size: 95,000 square feet
- Architect: SHW Group (now Stantec)
- Builder: Satterfield and Pontikes Construction

Meadow Wood dedicated its library to the memory of Sarah Chidgey Hughes, a much-loved teacher who died at age 28 in February 2011, after a battle with cancer.

Great schools. Great community.  
**BOND**  
2017  
Spring Branch ISD

**Please vote!**  
Tuesday, Nov. 7

Early Voting: Oct. 23 - Nov. 3

How will the **2017 Bond** impact my school?

**Buffalo Creek Elementary**

[www.springbranchisd.com/bond2017](http://www.springbranchisd.com/bond2017)

### Facility Upgrades & Improvements

- New Classroom Furniture
- Educational Specifications and Design Standards Upgrades
- Exterior and Interior Upgrades
- Roofing System Recoat

**Repair & Replace**

# Communicate/Implement

Great schools. Great community.



## The bond package will address:

- **Complete** the replacement of remaining oldest elementary campuses
- **Begin** transforming secondary schools
- **Upgrade** safety, security and technology
- **Upgrade** fine arts and athletics
- **Refresh** CTE classroom equipment
- **Replace** aged buses

Frequently Asked Questions >>

## Video Samples



# Evaluate

## Unofficial Election Results

Results are updated throughout the tabulation process. Please note the time stamp below.  
The results below include early voting, absentee (mail-in) voting, and election day voting.

November 7, 2017 Election				
Spring Branch ISD, Proposition A				
	ABSENTEE	EARLY	ELECTION DAY	TOTAL
FOR	349	3312	5938	9599
AGAINST	70	770	1619	2459
Over Votes	0	0	0	0
Under Votes	20	38	69	127
<b>Total Votes Cast</b>	<b>439</b>	<b>4120</b>	<b>7626</b>	<b>12185</b>

46 of 46 Precincts Reported

Updated 3/9/2018 1:05 PM

### Retrospect

Event Review: 2017 Bond Campaign

Team Member: Communications Team, Superintendent, Research & Evaluation

Date of Retrospect: \_\_\_\_\_ November 09, 2017 \_\_\_\_\_

...cess to capture team-based learning from an important project/ initiative of  
...cess factors and recommendations for continuous improvement  
...source, for use by the team or by others when tackling  
...Toolbox

WHA  
any  
and  
a n

#### Recommendations

Celebrate employee voting-not sure what that would look like, yet.  
Engage employees during the process.

Engage 18 year-olds to vote. Empower student councils to get their peers to vote.

Overall, there was less media coverage than ten years ago.

Drop letters in the middle of early voting. Not to conflict with other mail outs. Be aware of the timing of the letters.

Must understand the reality of the situation. Did Harvey cause a bump in positive voting? Did the Astros winning cause a bump in positive attitudes?