$387 Million Bond Campaign
A Successful Plan for Development and Renovation

NSPRA Gold Medallion Award Entry

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March 2017
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SYNOPSIS

Alpine School District (Utah) is the largest district in the state and the 44th largest in the nation. With 77,000 students, enrollment is growing rapidly and will top 80,000 students in two years with extreme growth patterns for the unforeseen future.

In order to gain taxpayer support, a successful plan was vital to ensure the passage of a $387 million bond, nearly double any of the previous three bonds over the past 15 years. It was imperative to inform our communities about this need while being transparent of the impact to taxpayers.

Alpine School District’s Public Relations Department was tasked with developing a successful plan that included:

- A needs assessment targeting enrollment projections and high growth areas along with age of existing buildings.
- Hiring an independent firm to conduct community focus groups and surveys to determine support and interest for seeking a bond measure in the upcoming election.
- A plan for selecting projects to be considered and vetted including costs, age, safety and impact to tax payers.
- Development and creation of a marketing campaign that highlighted our message through infographics to easily share through social media platforms of Facebook and Twitter, district and school websites, mailers, flyers, videos, and an animated whiteboard.
- Meetings with key stakeholders such as city mayors and city councils, community meetings, school faculty meetings and parent leadership teams like PTA and SCC (School Community Council).
- Establish and advise an advocacy “Yes” campaign (Friends of Alpine)

November 8, 2016 was a historic day as more voters than ever showed up to the polls with 68% favorability of the bond. This was the highest voter approval ever for an Alpine School District bond. Voters were informed and chose to support students with new, renovated and safe schools which represent: one new high school, two new middles and six new elementary schools, along with renovation or rebuild of fourteen existing school buildings.
Alpine School District turned 100 years old in 2015. Student enrollment has grown exponentially over those years. It is telling how a community supports this growth by how they vote at the polls for a bond. Fortunately, the district has benefitted from many bonds in the past. Most recently the following have been successful.

- 2001 passage of a $200 million bond by 62%.
- 2006 passage of a $230 million bond by 59%.
- 2011 passage of a $210 million bond by 57%.

Although thankful for the passage of these previous bonds, the Board of Education and district administration noted the declining support over the course of the previous three bonds. It was essential that the public relations team set out to determine the likelihood of success for the 2016 bond and what would be required to ensure its passage. It’s evident that the thorough research, planning, communication and transparency with the public made the 2016 bond of $387 million the most successful with voter approval at 68%. The following research steps were conducted over the course of a year eleven months starting in October of 2015. Based on these steps, the Board of Education created a resolution on August 17, 2016 to put the bond on the November 2016 ballot.

Goals and Measurable Objectives
The public relations team was tasked with the following goals and objectives to determine the feasibility of a bond initiative.

Goals:
1. Share bond accountability with patrons demonstrating transparency and gaining support for the 2016 bond.

2. Gain a majority of support from patrons through anecdotal and scientific research for the 2016 bond.

3. Place the bond on the 2016 ballot based on a firm show of support resulting from the research efforts.

Objectives:
1. After sharing a “bond accountability” presentation with patrons at all 84 school sites, determine their level of support for putting a new bond initiative on the ballot.

2. Determine the level of support patrons have for education in general at their local neighborhood school as well as for
the district as a whole.

3. Survey parents district-wide through 75,000 email accounts regarding their level of support for a bond on the 2016 ballot.

4. Task an independent research firm to determine the level of support of likely voters for a bond through focus groups and scientific survey analysis.

Methodology and Support Materials
The process used over the eleven months of research includes the varied methodologies and support materials shown here based on the four outlined objectives.

Objective 1 – Bond Accountability Presentation/Feedback
A bond accountability meeting was presented at all 84 school sites throughout the district. The presentations were given by district administration teams and included discussions of previous bonds commitments. Following the presentation and discussion, feedback was gathered both written and via a QR code that provided information to the PR team. The full presentation is available here: Bond Accountability Presentation

The presentations were made in October and November of 2015. A schedule of the meetings included the cabinet and board members. Following the presentations, patrons were asked to provide feedback. Feedback was received from nearly 250 individuals. The team was able to use as anecdotal information to share with the Board of Education as plans were developed for possible bond projects. The feedback can be found by clicking here.
Objective 2 – Support for Education in Neighborhood Schools/District
It was imperative to the Board of Education that there would need to be a high level of support from parents about the education received by students in their neighborhood schools. The task was to determine this level of support by conducting a survey that was sent out to all parents/guardians.

With over 6,000 respondents from the parent/guardian survey, the feedback for the quality of education students were receiving in the Alpine School District was positive and parents/guardians supported schools in general. (This lead to further survey questions for patrons created by both the district and an independent research firm.) (This lead to additional survey questions created by the district and an independent research firm for parents and likely voters.)

Objective 3 – Support for a Bond (District-created Survey)
Before funds were spent on hiring an independent research firm, the PR team developed a survey to find out general support for a possible bond initiative. The most favored bond projects from the survey indicated building more schools to accommodate growth as priority, then, security, technology and rebuilding/renovating outdated schools rose to the top.
Objective 4 – Independent Research Firm

After completing our due diligence as a district, it was necessary to find an independent research firm that could provide scientific and impartial evidence that a bond measure would be successful for Alpine School District. Y2 Analytics was selected to provide this research through focus groups and independently designed surveys for likely voters within the boundaries of the district. The research was conducted in February and March of 2016 followed by a presentation to the Board of Education during a Study Session on March 29, 2016. Below are segments from the presentation the board considered towards the likelihood of a successful bond initiative.

1. We modeled likely voters in the Alpine School District and collected data through an online survey.
2. Given only the ballot language as information, more than 50% of voters say they would support a potential school bond.
3. A description of the growth of the district and the low cost to district residents are the messages that resonate with the most voters.
4. Following a series of messages in favor of the bond, support jumps to 74%.
5. Other factors that increase support levels include having children in schools, volunteering with the PTA, and being a district employee.

ALPINE SCHOOL BOND SURVEY 2016
DRAFT RESULTS & ANALYSIS

THINGS TO REMEMBER
One of the difficult aspects of a bond measure in the State of Utah is the ballot language. In fact, many voters express confusion with the language and usually end up voting against the bond. With this in mind, Y2 Analytics developed a survey with two methods. The first method is determining bond support on an “uninformed” voter. The survey respondent is given a “cold” read of the ballot language and is then asked to respond with their likely support for or against the bond. As you can see below, 59% of survey respondents indicated they would likely vote for the bond.

In method two, survey respondents are given information about the district and bond including how taxes would not increase because of so many new residences and businesses within the district’s boundaries. Following this information, 74% of survey respondents were more likely to vote for the bond.

This information was valuable because it indicated that as a district we needed to be very purposeful in getting an informed citizenry out to the polls. The analysis/planning and communication/implementation sections will show how this was carried out based on the important research findings.
With evident support from the community based on input meetings, district surveys and independent survey findings, bond planning was put into full swing. A timeline was quickly established to ensure that the correct information was clear to all likely voters. A great amount of time was spent researching and verifying that the public would support our bond during the research stage of the process. Many plans were developed prior to August and the official board resolution was established on August 16, 2016, officially putting into place the bond campaign.

**Identification of Target Audiences**

Working with Y2 Analytics, target audiences were established based on likely voter trends. Specific emphasis was placed on district employees, parent organizations such as PTA and School Community Councils, community groups like Kiwanis, Rotary Clubs and senior citizens and governmental groups such as mayors, city councils, senators, legislators and other locally
elected officials. The following will address how each of these stakeholder groups were informed brought on board as supporters of the bond initiative.

**District Employees**
A bond initiative is as successful as the support it has from those within the organization. It was imperative that our nearly 8,000 employees were knowledgeable and good communicators about the bond since they have a strong public voice with parents and community members. Employees are trusted and the ones people seek after in the school system when they have questions.

Training all employees was an integral first step in the bond campaign process. Various departmental meetings and individual school faculty meeting were held at all 84 school sites. The presentation was successful in sharing the correct information about the bond.

Employees expressed appreciation for the meetings and quickly became our best advocates for the bond initiative. While some expressed concern that their school wasn’t part of the bond, most jumped on board with support.

Because of state law, it was also important to go over the details of district policy relating to political involvement by district employees. It was empowering to many when they realized that they could be active participants in the campaign on their own personal time.
Parent Organizations

We are fortunate to have strong parental involvement throughout the district. Every school has a Parent/Teacher Association (PTA) and a School Community Council (SCC). The SCC is a group of elected parents at each school tasked with ensuring a strong school improvement plan is in place along with addressing specific needs of safety, literacy, etc. In essence, they are like a mini school board at each school location. Once again, district cabinet members held meetings with each of these groups at each school site.

Community Groups

There are many community groups that were important for us to work with in the development of our bond planning. Many meeting were held with these groups to make sure that they received correct information. Some of these groups included Kiwanis, Rotary, United Way, and Senior Citizens.

Governmental Organizations

Making sure that all governmental organizations were involved in the planning stages was vital for community support. We were fortunate to have the backing from mayors in all fourteen of our municipalities. Their city planners were involved in working with...
our buildings and grounds department to determine areas of high growth. Other elected officials gave public support for the bond initiative. Even the very conservative Utah Taxpayer’s Association held a neutral stance on the initiative which, in essence, was a great support for the bond. There was no known opposition to the bond.

Key Leaders
The bond initiative became a top priority for district administration. All administrators were involved in providing training and presentations throughout the district. The individuals with key leadership roles include the following:

Bond Public Relations Team:
David Stephenson, Administrator of PR
Kimberly Bird, Assistant to the Superintendent

Cabinet Members making presentations:
Sam Jarman, Superintendent
Rob Smith, Assistant Superintendent
John Patten, Assistant Superintendent
Jess Christen, Administrator of Operations
John Spencer, High School Supervisor
Shane Farnsworth, Jr. High Supervisor
Mark Pew, Starlene Holm, Barry Beckstrand and Vicki Carter, Elementary Supervisors

Garrick Peterson, Education Services
Kevin Cox, Human Resources

School Board Members
John Burton, President, JoDee Sundberg, Vice President, Scott Carlson, Wendy Hart, Paula Hill, Brian Halladay, and Debbie Taylor.

Bond Counsel
Farnsworth & Johnson

Friends of Alpine “Yes” Advocacy Campaign Group
Executive Committee: John Burton, Chair, Brad Frost and Charlotte Ducos
Selection of Communication Vehicles

It’s no secret that we are living in a new age for sharing information. As we looked at previous success of bond communications, it was determined that we would still use both traditional methods as well as a robust integration of digital communication. The following communication vehicles were employed to inform voters regarding the bond initiative:

- Community Meetings
- Comprehensive Website
- PowerPoint Presentation
- Whiteboard Animated Video
- Various Bond Videos
- Infographics
- Facebook (Boosted Posts)
- Twitter Messaging
- Electronic Surveys
- Business Cards with QR Codes
- School Marquee
- Consistent Information Messaging to Parents via Student Information System (SIS)
- Electronic Billboards
- Voter Information Pamphlet
- Mailers/Fliers
- Postcards
- Open House Presentations
- Yard Signs
- Online Feedback
- Newspaper Editorials
- TV News Reports
- Weekly Email to District Employees
- Weekly Email to all Patrons
- Online Feedback
- Newspaper Editorials
- TV News Reports
- Weekly Email to District Employees
- Weekly Email to all Patrons

Budget and Resources

The total budget provided by the district for the information campaign was set at $50,000. The bulk of these funds were used as follows:

- $23,000 – Y2 Analytics for Focus Groups and Scientific Survey
- $12,000 – Bond Counsel
- $5,000 – Printing Costs
- $6,000 – Mailing Costs
- $4,000 – Video Production Costs
COMMUNICATION/IMPLEMENTATION

With the resolution completed by the Board of Education on August 16, 2016, it was time to start a very robust, fast-paced 85-day information campaign. Prior to the bond resolution, a great deal of time was put into place to inform the public of the need for a bond. Following are the key target dates for various bond information campaign components:

Key Bond Campaign Target Dates

- October – November 2015
  Fall Community Meetings
- January – April 2016
  District Surveys
  Y2 Analytics Focus Groups and Surveys
- April – May 2016
  Community Meetings
- April – July 2016
  Patron Feedback on Proposed Bond Projects
- August 2016
  Summer Mailer (newsletter with double page centerfold on “Why Bond?”)
  Launch Information Campaign (website, social media, video, etc.)
  Launch Friends of Alpine “Yes” Campaign
- September 2016
  Meetings with Mayors, City Councils & Other Elected Officials
  Administrator & District Faculty Training Meeting (share PowerPoint and Bond Infographic)
- September – October 2016
  Community Meetings, SCC & PTA Meetings
  Voter Information Pamphlet
- November 2016
  Final Email and Social Media Blitz
- November 8, 2016
  Election Day
  Election Night Results Party
  Launch “Thank You” Campaign

Each of the key bond campaign items listed above is detailed specifically over the next four pages.

Branding

Specific branding techniques were used throughout the yearlong bonding process to help build consistency of our message for our stakeholders. Time and effort was put into design a unique logo with the slogan “Growing Forward.” A clear color palette was established to achieve consistency.
Key Campaign Components (April – November 2016)

1. Community Meetings – April 2016

A flyer was distributed throughout the district and invitations were sent out via email to all patrons to attend a community meeting where the proposed projects would be shared.

The PowerPoint presentation gave those in attendance an excellent overview of the projects and the financial impact on taxpayers. This was the first opportunity for patrons to get a look at the draft that included one new high school, two new middle schools and six new elementary schools. It also included rebuilds and renovations of existing outdated schools.

A feedback period lasted until July 2016. Every effort was made to gain insights from our public on the proposed bond projects. This feedback was gathered using a Google Form and QR Code. The results were compiled into a presentation given to the board by the PR Team.
2. Summer Mailer – August 2016

A 12-page summer mailer (newsletter) is sent to 93,000 residences within the Alpine School District every summer. It contains four points why the Board of Education was studying the feasibility of a bond. These include growth, aging building, favorable interest rates and need for land acquisition.

3. Launch Information Campaign – August 2016

Like racehorses out of the chutes, the information campaign was fast and furious. Electronic communication was a vital component how we shared information and relied on our many supporters to further the information through their own social media accounts.

- **Website** - A comprehensive website was created to share all components of the bond including projects, funding, ballot, FAQs, timeline, early voting process, news, etc.
- **Social Media** - Frequent posts, shares and videos were created on our *Facebook* and *Twitter* (@alpineschools) account. We also have a *social stream* link on our website that compiles all of our social media into one location.
- **Video** - Videos were posted to our *Youtube Channel* and shared that many avenues. Videos topics include an overview animated video, bond projects, taxpayer impact and why bond.

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4. Bond Infographic
The bond infographic was the most effective manner to share the bond projects, costs, ballot language and taxpayer impact.

5. Using the Media
Local newspapers and news stations reported favorably on the bond initiative.
- Daily Herald Editorial
- KSL Newsreport

6. Friends of Alpine “VOTE YES” Campaign
The Friend of Alpine Campaign raised more than $40,000 and created fliers, radio ads, electronic billboards, etc.
- Website
- Flier
- Radio Ad
- Example of Banner/Yard Sign
EVALUATION

With the success of the bond initiative and the likelihood of additional bonding needed in the near future, it has been extremely important to reflect on the entire process so that future initiatives can benefit. The 2016 bond passed with the highest voter approval rating than any previous bond. The following were key components that made an impact on this accomplishment:

Measurable Indicators

- Key messaging strategies were developed in coordination with Y2 Analytics. Based on the percentage of likely voting in favor of the bond, these six components affected the messaging strategies employed.

**SPECIFIC BOND PROJECTS**

This assurance message resonated with an overwhelming majority of our respondents.

The money from this bond can only be used for projects that are specified in advance. For example, this proposed bond would only be used to purchase land for new schools, to build new high schools, new middle schools, five new elementary schools, and rebuilds of two other elementary schools, to upgrade roofing on three schools, and to pay for a series of upgrades and remodels of two other schools — improving school facilities for students from nearly every area in the district.

**LOW COST TO TAXPAYERS**

Knowing that the increase in the tax burden will be minimal increases support.

For just a few pennies each year, taxpayers could support Alpine District schools. This school bond would only cost the average homeowner in the Alpine School District an additional $0.06 in property taxes per year.

**SAFER SCHOOLS FOR STUDENTS**

Safety improvements in schools throughout the district garner strong support.

The new buildings and the building upgrades will result in safer schools for the children of Alpine School District. New building designs will allow faculty and staff to monitor visitors’ access to schools, and seismic upgrades will help protect students throughout the district in the event of an earthquake.
Three other areas of for messaging that led to informed voting included a solid track record of transparency with previous bonds, an explanation of the fastest growing district, and the consideration of alternative solutions if a bond were not passed.

This focused messaging helped us target likely voters resulting in the first time that all fourteen municipalities within the district voted in a majority support for the bond.
Evaluation of Things Learned

• The timeframe between the official resolution and the election was too short. With early voting, information had to be shared quickly resulting in a rush to prepare videos, flyers, etc. The recommendation is that a future bond resolution be approved by the Board of Education a month earlier (end of June).

• Establish the Friends of Alpine “YES VOTE” campaign much earlier and be more selective to make sure there are a variety of participants on the committee.

• Keep traditional methods such as mailers to a minimum and gear funding towards social media platforms and electronic communication methods.

• Boosting messaging in targeted areas results in a higher percentage of likely voters supporting the bond initiative.

• A strong team of all stakeholders makes the process effective. Lasting relationships have been developed with all who participated. It truly takes a team to move such an initiative forward.

Many of the documents shared in this award entry are compiled together in the following Google folder:
https://drive.google.com/drive/folders/0B4Vwot5xMly-UW82T2c5YzFxanM?usp=sharing