



# Tax referendum guidebook

**A successful tax referendum campaign is not accidental.**

It takes a lot of effort and strategy on the part of the superintendent — and building the momentum to a positive outcome takes time.



If you're preparing for a tax referendum in the next year, use this guidebook as a step-by-step blueprint for a successful campaign. These methods are tested and, when executed well, can result in a positive outcome for your school district's levy.



## Step one: Study your surroundings

Before you take any action, it's critical to understand your campaign limitations.

### Remember:

You can share information, but there are strict rules around campaigning, so your efforts can't be seen as a district initiative. This is especially important when you're engaging campus leaders to help spread news.

When you're thinking about your roll-out and election cycle, you'll benefit from knowing how many other referendums may be coming up. Are there any politicians or other agencies with whom you can partner to aid both efforts?

It'll also help you down the road if you start by discerning public official and board member sentiment regarding your campaign topics. Are your board members united or divided? Will they be front and center, or working behind the scenes?



Getting a sense of how things stand will help you determine whether to focus your energy. Your goals here are to:

- Anticipate common questions
- Develop clear, consistent messaging
- Understand potential opposition so you're prepared with counterpoints



## Step two: Control communications

Timing is everything, so make sure you've been strategic about when, how, and where to publicly announce your campaign.

But once the news is out — the job of controlling the narrative begins. In the social media era, there will be a lot of places your community sees information, but it won't always be accurate or fair.

Straight away, launch a single platform for information that supports two-way dialogue. Make sure your community knows there is only one place to go for up-to-date, true content surrounding your campaign. If it isn't confirmed or shared there, it shouldn't be regarded as legitimate.

**Note:** The two-way communications feature of your platform will be critical. If they can't ask questions or give feedback to you directly, they'll go somewhere else.

When delivering communications, consider every stakeholder group and cater your messaging tactics to their preferences. Teachers will be interested in different topics than parents. And while teachers can hear presentations at their school building, it may be more difficult to get information out to your elementary school parents. How will you intentionally engage them?

Maintain a presence on social media and consider hosting virtual information sessions. You might be surprised by how many people can join a livestream, even if they wouldn't or couldn't attend an in-person meeting.

If possible, share your message on radio shows or local news channels. Anyone who is willing to listen should hear your pitch. Information spreading is the most critical component of your campaign efforts. In this stage, your goals are to:

- Go public with your campaign
- Make sure people know where accurate information can be found (and where it can't)
- Ensure the correct information is available to everyone in their preferred language and through their preferred channel



## Step three:

# Initiate internal inquiries

Now that the word is out, it's time to refine your campaign. Gathering feedback from all your internal and external stakeholders is critical.

We mentioned teachers and parents will have different interests — but so will board members, students old enough to vote, school staff (like food service workers and transportation professionals), your unions, and your community's senior population.

Tailor your messaging to the needs and interests of each group. And most importantly, be prepared to pivot! In many communities, the school district is one of the largest employers, so if your internal stakeholders aren't satisfied with the campaign proposal, you could be losing your largest block of voters.

To aid in your information-sharing campaign, involve unions and campus administrators. Listen to their concerns and craft your conversation points around mutual benefits.

We can't stress this enough: None of your campaign work can be perceived as a **district** effort. When bringing in your campus leaders, make the distinction clear and ensure they're helping spread information — and nothing more.

This will likely be the longest phase. We heard from Dr. Debra Pace — retired superintendent, Osceola County Schools (FL) — that she hosted over 120 informational sessions with her internal and external community while preparing for her 2016 tax referendum vote.

In this stage, your goals are to:

- Gather feedback to continually tailor your messaging by population segment
- Pivot as needed to refine your campaign proposal
- Be willing to put in the work: It takes time and energy to successfully pass a referendum



## Step four:

# Execute and excel (then celebrate)

The best thing you can do for your campaign is launch an independent oversight committee that ensures you're meeting referendum metrics after it passes. We've heard from several superintendents that this alone was the make-or-break feature between failing with a levy one election cycle and passing it the next.

Your community may like your ideas. They may **want** the referendum to pass. They may even trust you! But they might not believe you're able to make it all happen.

Here's the game-changer: Show you're open to being held accountable to the goals and requirements listed in the referendum proposal.

Let them know there will be consequences if aspects of the referendum aren't carried out. Prove your commitment to your community and they'll be willing to take the leap with you!

Dr. Michael Grego — retired superintendent, Pinellas County Schools (FL) — followed the above steps and passed a tax referendum with a nearly 80% approval rating. His success was due in part to:

- Taking extreme care and lots of time when spreading accurate information to his community, including hosting gatherings at senior homes, connecting with families, and involving his principals and unions in the efforts.
- Building an oversight committee made up of community advocates, business leaders, and other trusted citizens.
- Utilizing a two-way communications tool called Let's Talk as a single-stop information platform that allowed community members to submit questions, concerns, and feedback — all while streamlining the influx of inquiries for his team on the backend.



Passing a tax referendum is a long process — it doesn't start a few weeks or months before the election. It requires immense trust in your leadership. **And the journey of trust-building extends beyond a referendum campaign.**



The biggest question you need to ask yourself is:

**Are we as a district moving in the right direction, and does the community trust our leadership?**

If the answers to those questions are “Yes!” then preparing for a referendum won’t be a stressful or nerve-wracking period.



**Focus on building deep trust, sharing accurate information, and ensuring your community has the ability to get answers when and how they need them. You can do this!**

K12 Insight has partnered with hundreds of school districts around the country, including both Pinellas and Osceola County Schools. Our customer service and intelligence platform, Let’s Talk, is the only one built especially for K-12 — through it, school leaders have transformed their customer service delivery (and seen the benefits, including successful tax referendum campaigns).



**If you’re interested in learning more about Let’s Talk and K12 Insight’s entire suite of customer service solutions, scan the QR code.**

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