

2023 Finance Referendum Campaign 2024 Golden Achievement Award

Jennifer K. Valley
Director of Marketing & Communications
jennifer.valley@rpsmn.org
612-798-6029

Richfield Public Schools ISD #280 401 70th Street West Richfield, MN 55423 District Type: Urban District Enrollment: 4,200 Communications Staff: 2



### **SYNOPSIS**



In November 2023, amidst uncertainties of post-pandemic public opinion, Richfield Public Schools achieved the decisive approval of a two-question referendum: renewing its existing technology levy and doubling its operating levy. Three factors made this campaign remarkable:

- 1. The election followed a historic 2023 MN Legislative Session, during which state legislators touted "fully funding" K-12 schools. Against these headlines, the district was asking voters to increase local property taxes.
- 2. A short timeline. The Legislative Session ended on May 22. The school board decided on the referendum question in August, and early voting for the November 7 Election started on September 22.
- 3. Overwhelming success: 81.3% voter approval for question 1 and 72.5% for question 2.

Academic gains, school funding and public trust were at stake in this campaign. Richfield Public Schools has been a leader in closing opportunity and graduation gaps, and without additional operating revenue, successful educational strategies were at risk. The Technology Levy (Q1) provided \$4.7 million annually and would expire in 2024 unless renewed. The Board also needed to make a critical decision about asking voters to increase their operating levy (Q2). With inflation and the economic climate, board members worried about risking public trust if they asked for too much.





Applying the four-step process, Richfield's team conducted qualitative and quantitative research to inform decision-making and communications. They engaged community opinion leaders and locally elected officials. This effort grew from a long tradition of community engagement; it was more than a 12-week informational campaign.

Delivering on our Promises, the campaign theme aligned the referendum with the district's **Strategic Plan**. The campaign celebrated achievement, focused on students, and reinforced public trust. Implementation strategies amplified opinion leaders, saturated all channels, and inspired voter turnout for the off-year election.

The campaign evaluation included precinct-by-precinct analysis, metrics for each communication strategy, and a demonstration of public trust. With overwhelming voter support for both questions, the district secured \$90 million over the next ten years (11% of its annual operating budget), stabilized district finances for the future, and realized a high level of public trust.

### RESEARCH



A metropolitan district, Richfield Public Schools (MN) serves just over 4,000 students across six schools, an early learning center, an alternative high school program, and a Transition Plus program. District boundaries cross two municipalities (Richfield and a small portion of Edina). **Demographically**, the district is diverse with no ethnic majority: 43% Hispanic or Latino; 29% White; 13% Black; and **24% Multi-Language Learners (MLL)**. By policy, all communication is provided in English and Spanish. The median household income is below the state average; the average home value is \$300,000. The district benefits from a large commercial/industrial tax base, which reduces the tax impact on district residents.

With a reputation for community engagement, fiscal transparency and robust communications, Richfield voters have long prioritized education spending. **The District has several advisory committees actively engaged in planning** (Finance, Teaching & Learning, Technology, Facilities, Athletics, etc.). During the 2000s through 2017, the district held referendums about every two years, leading to volunteer fatigue. The District's last referendum was in 2017; citizen committee leaders were no longer engaged. New leaders would need adequate time to organize and plan.

The Minnesota Legislature touted "historic education spending" during their 2023 session. While revenue increased, many new mandates accompanied the funding. Ultimately, the increase in state revenue did not fill the gaps in need, especially since federal pandemic funding was expiring simultaneously. The District could need to <u>rely on third-party</u> groups (p.3) to explain the complexities of state funding, the cost of new mandates, and the continued need for local referendums. Working in cooperation with other districts would provide a unified message.

A <u>comparison of local referendum funding to neighboring districts</u> presented a compelling picture; Richfield's local tax effort was half that of neighboring districts. In addition, current property taxes (2023) were lower than those five years ago. (Two important key messages.)

To understand the audiences and information needs, the comprehensive research plan included:

- **Secondary research** on district referendums, including historical data, voting trends, and impact on the community.
- Analyzed past referendum outcomes and voter engagement strategies.
- Reviewed state and national voter behavior statistics to inform strategies (e.g., parents of school-age children mostly support but are least likely to make time to vote).
- **Engaged key stakeholders**, including district officials, community leaders, active community groups, other metro superintendents, and staff in planning to inform decision-making and messaging.
- **Developed a comprehensive glossary guide** for staff and volunteers to ensure all messaging was factually accurate and clear.
- · Analyzed primary staff and parent survey data
- Content analysis of local media and social media groups to anticipate issues.
- Conducted two primary, formal, random-sample phone surveys. February | August

### **PLANNING**



The planning phase of Richfield Public Schools' referendum campaign started almost a year before the campaign and built on existing community engagement and communications strategies. Grounded in the <u>District's Strategic Plan</u> and informed by research, our approach prioritized clear messaging, robust outreach, and effective engagement to create a proposal that the community could support.

To deliver on their promises in the Strategic Plan, Richfield identified how the renewed technology levy and increased operating levy would be used to continue meeting defined goals.

### View the Referendum Plan

### 1. Strategy Development:

- <u>Campaign timeline</u>: Kick-off research (January), begin issue priming (March), anticipate the close of
  - the Legislative session (May), statutory deadlines (August), back-to-school (August), the start of early voting (September), Election Day (November), post-election communication.
- Campaign Theme: Align the campaign theme with the district's Strategic Plan, *Richfield Realized*, and referendum past promises to emphasize continuity and reinforce the district's commitment to achieving its goals.
- Stakeholder Involvement: Personal outreach to involve key stakeholders, including opinion leaders, elected officials, staff and community groups in the planning process.
- Research Integration: Integrate insights from qualitative and quantitative research into the campaign strategy to effectively tailor messaging and outreach efforts.

#### 2. Messaging Strategy:

 Clear Communication: Use one master messaging document to ensure clear and concise messaging across all materials and efficiently use translators' time. Highlights the referendum's benefits for student support, academic gains, school funding facts, how to vote, and public trust.

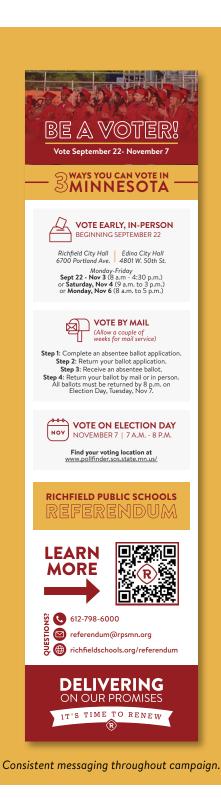


See supporting materials beginning on page 9.

- Evidence-based Messaging: Support all claims with independent third-party data (academic data, financial data, legislative statements).
- A Compelling Need: Demonstrate the impact of funding and inequities compared to more affluent neighboring districts.
- Language Accessibility: To accommodate the district's diverse audiences, ensure all communication materials are provided in English and Spanish.
- Fiscal Responsibility: Emphasize the district's prudent financial management, transparent budgeting, and lower property taxes.

### **PLANNING**





#### 3. Outreach Plan:

- Multi-Channel Approach: Implement a multi-channel communication approach that leverages face-to-face opportunities, traditional media, social media, community events, and direct mail to reach audiences.
- Community Engagement Events: Leverage existing community engagement events to interact directly with stakeholders and answer questions.
- Volunteers: Mobilize volunteers to help with outreach efforts and ensure advocates have the information and answers they need.

### 4. Voter Turnout Strategy:

- Inspire Action: "Be a Voter" National research indicates appealing to identity is more effective for young and reluctant voters than "Vote."
- Early Voting: Promote early voting opportunities to encourage voter participation for busy families and make it more convenient for residents to cast their ballots.
- Election Day Reminders: Visual reminders and message saturation across all communication channels since the school district was the only issue on the ballot.

### 5. Evaluation and Monitoring:

- Metrics Tracking: Establish key performance indicators (KPIs)
  to measure the effectiveness of communication strategies and
  outreach efforts, such as early voter turnout, questions submitted,
  social media reaction, and media coverage.
- Feedback Mechanisms: Implement feedback mechanisms for rapid response to questions and rumors; proactively meet with residents known to watch budget and tax issues closely. Gather input from residents and stakeholders throughout the campaign and make necessary adjustments to the strategy.
- Continuous Improvement: Use insights gained from evaluation and monitoring to continuously refine and improve the campaign strategy in real time, ensuring maximum impact and effectiveness.
- Election Evaluation: Survey volunteers and key leaders regarding strategy and tactics effectiveness. Summarize campaign to inform future strategy.

## **IMPLEMENTATION**





richfieldschools.org/about/referendum

**Collaboration with Stakeholders:** Richfield Public Schools collaborated extensively with various stakeholders to develop and finalize the content for each component of the informational materials. This collaborative approach ensured that the perspectives and insights of all key parties were considered, enhancing the relevance and effectiveness of the materials.

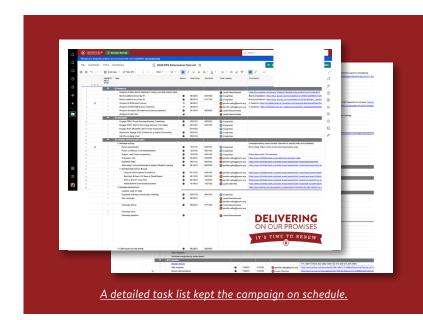
**Design and Formatting:** The district focused on designing the materials' layout and formatting to optimize readability, translation ease, and visual appeal. By prioritizing user experience, Richfield aimed to make the information easily accessible and engaging for all stakeholders, regardless of age or background. Per District standards, all materials were provided in English and Spanish, which meant designing for dual languages.

**Feedback and Revision:** Following the initial development phase, Richfield reviewed the materials to assess their clarity, accuracy, and accessibility. Stakeholder feedback identified areas for improvement, and revisions were made accordingly to enhance the materials' overall impact and effectiveness. Feedback drove the District to simplify content and center on a few memorable messages. Additionally, younger audiences preferred digital information, while older residents preferred direct-mail print or verbal communications.

#### Tools and tactics supported a multi-channel approach

- Website development
- Social media campaign
- Internal communications/presentations
- Media Relations
- How to Vote materials (e.g. how to vote bookmarks, informational postcards)
- Required mailers
- · Face-to-face meeting materials
- Training materials for staff (e.g. dos and don'ts, talking points, newsletter blurbs)
- Building signage
- Phone and email scripts for voting reminders

See Materials in Google Drive



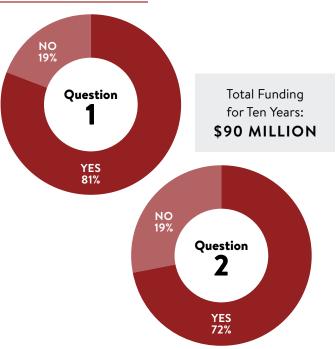
### **EVALUATION**



Key performance indicators for this campaign included voter turnout, <u>election results</u>, early voting participation, digital metrics, and tool and tactic evaluations to inform future campaigns. The successful campaign was featured as a model for other <u>districts in an association newsletter</u>.

### **Election Results**

- The District won supermajorities in each precinct for both questions.
- From pre-campaign survey (58% support) to election results, Q2 support increased 14%.
- Voter turnout was on par with other off-year elections when only school district issues were on the ballot: 17% Voter Turnout, 5,389 Total Voters
- Early voting attracted 802 early voters (15%), which was unlikely a factor in the results but aided in building momentum up to Election Day.



### Campaign Evaluation

The District has an outstanding relationship with its community. Engaging advisory groups and opinion leaders early in the campaign was critical to its success. The district has also achieved an exceptionally high level of public trust (83%). In this small, urban community, word-of-mouth and relationships matter. Working in partnership with the City of Richfield, city leaders, the city elections clerk, and city staff had the information they needed to answer citizens' questions. Being respectful and responsive with residents via personal meetings and phone calls made all the difference. No visible opposition formed and support was strong.



"Earning the trust and support of our voters is something we work on every day."

- SUPERINTENDENT STEVE ULOWSKY

## **EVALUATION**



Proactive planning started with research and engagement almost a year in advance. Working with communications partners from CEL Marketing PR Design and Captivate Media allowed the District's communication team to manage the busy back-to-school season and launch the referendum campaign, meeting critical timelines and responding to requests. No single tool reached all voters, so the multichannel campaign, with consistent messaging across channels, ensured contact with all active voters.

A survey of key volunteers and leaders provided the following open-ended feedback:

- The campaign was well planned and executed.
- Delivering on our Promises was a great tagline and easy for folks to remember.
- Messaging on cost was clear, making the choice easier for residents.
- Comparing operating levy funding for RPS to neighboring districts was critical.
- Explaining tax impact and the simplicity of voting yes vs. no was helpful.
- Featuring students and teachers was great. Coming to PTSO meetings was great.
- Activating the yes vote was critical. Not sure phone banks were very effective, but support from the Yes committee and Education Richfield was important.

RANKED VALUE OF TOOLS & TACTICS	
1	<u>Video</u> (approximately 10,000 reach)
2	Direct Mail pieces <u>August</u>   <u>October</u> (15,000 households)
3	Website (Traffic spiked on Election Daybut only reached a portion of voters (<1,500 users)
4	Social Media posts Calendar (important but only reached a portion of voters (<2,000)
5	<u>Fliers</u>
6	<u>Emails</u>
7	<u>Posters</u>
8	Robocalls
9	A-Frame Signs at schools pick-up/drop-off
10	<u>Bookmark</u>



### **VIDEO**



Learn about our 2023 referendum questions

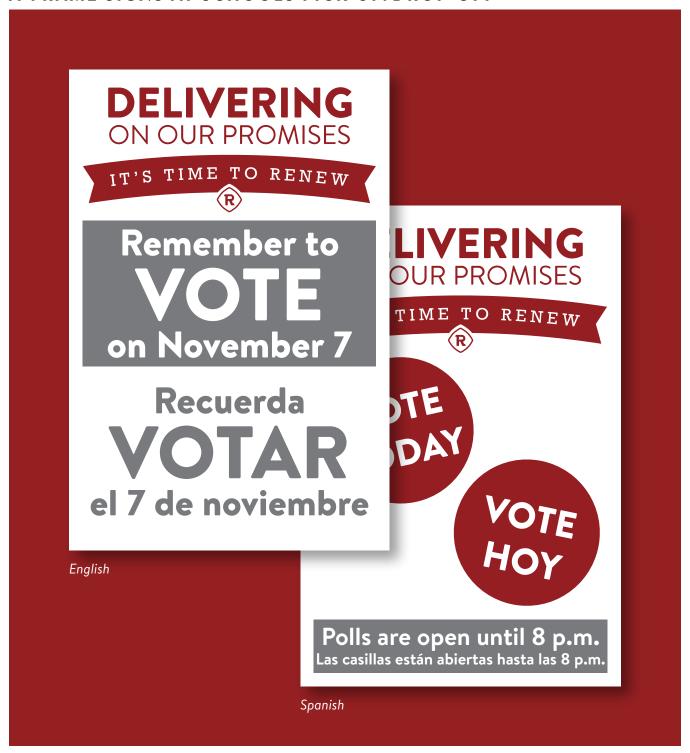


### **DIRECT MAIL PIECES**





### A-FRAME SIGNS AT SCHOOLS PICK-UP/DROP-OFF



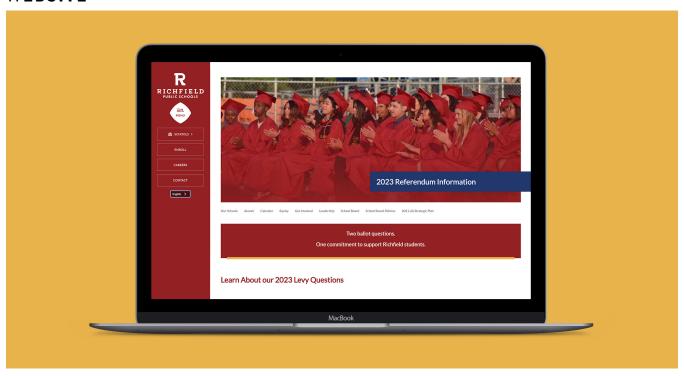


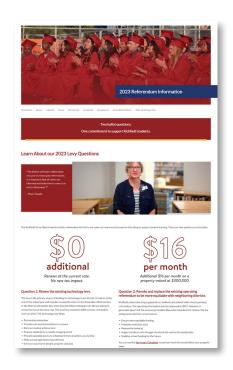
#### **POSTERS**

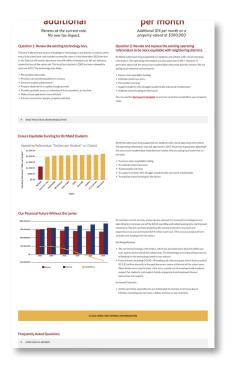




### WEBSITE



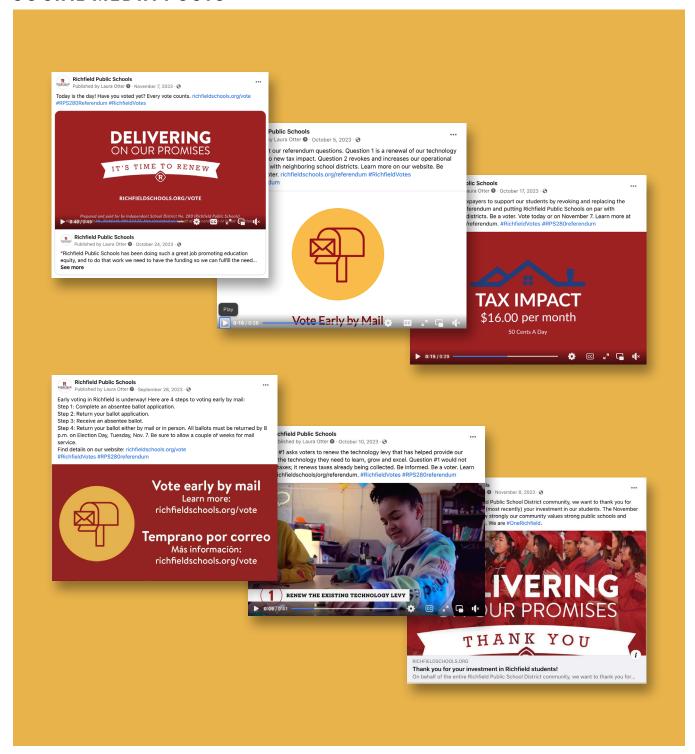






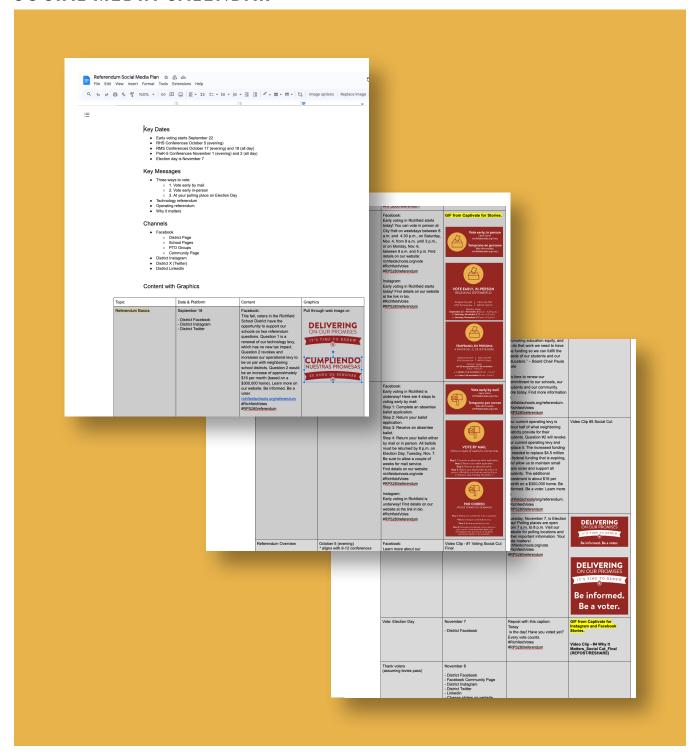


### **SOCIAL MEDIA POSTS**



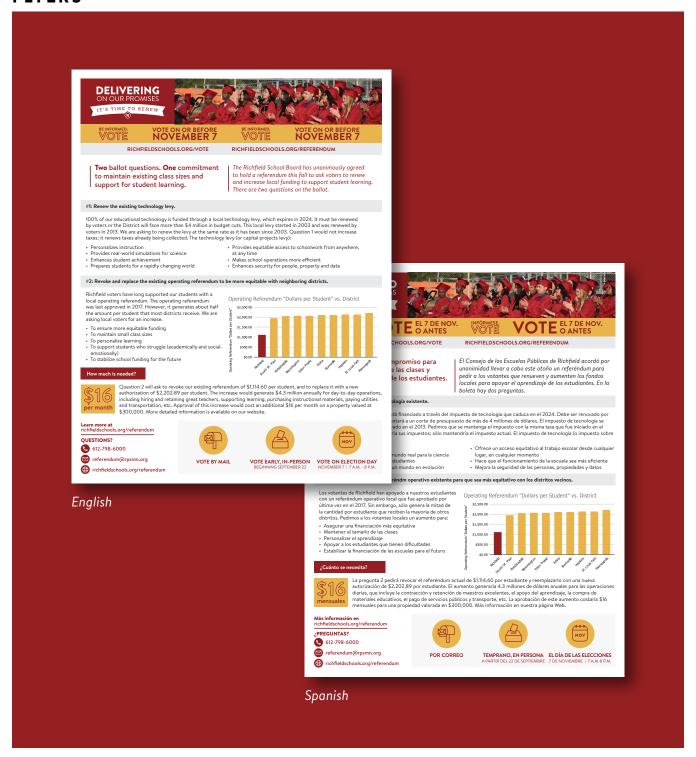


### **SOCIAL MEDIA CALENDAR**



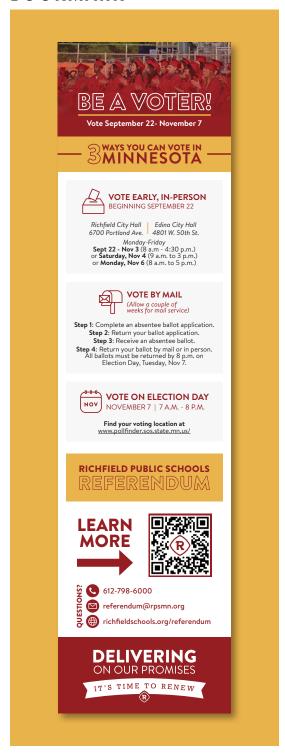


### **FLYERS**



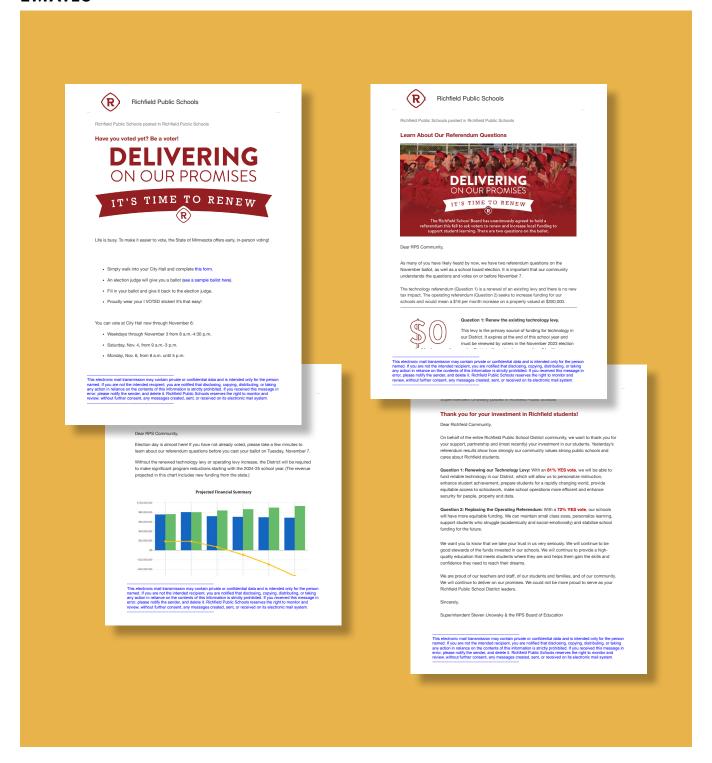


### **BOOKMARK**





#### **EMAILS**





### **NEWSLETTER**

