



DISTRICT 186
SPRINGFIELD PUBLIC SCHOOLS

OUR SCHOOLS OUR FUTURE

VOLUME 3:
FUNDING

EXECUTIVE SUMMARY

SPRINGFIELD PUBLIC SCHOOLS DISTRICT 186

ONE SANGAMON

In response to the need to address aging facilities infrastructure, concerns about equity, and the need to create future-ready, highly functional learning environments, the Springfield Public Schools District 186 (Springfield, Illinois in Sangamon County) undertook a 2-year comprehensive master plan that led to a successful county-wide sales-tax referendum. **The journey involved the coordination and cooperation of many local and regional entities with differing missions uniting for a common vision: One Sangamon.**

This vision identified three District priorities: to create future-focused learning environments that support the success of all students; to create places our community can gather and be proud of; and to use the District's financial resources in the most efficient and effective way.

OUR VISION

for the future of SPS facilities:



Future-focused learning environments that support the success of all students.



Smartest use of the District's financial resources.



Places our community can gather and be proud of.

FINANCIAL MODELING & SCOPE OF WORK

With the fully developed master plan created for Springfield District 186, the process could begin of defining the scope of work and understanding current and potential funding sources through financial modeling. The first step in this process was assembling the perfect team of funding experts and district representatives to conduct the financial modeling. The financial team included:

- » Stifel Nicolaus, Financial Advisors and Bond Consultant
- » Unicom ARC, Referendum Experts
- » BLDD Architects, Referendum and Planning Experts
- » District 186 Administration
- » Sangamon County Representatives

This team collaborated to understand both the scope of work and identify the funding sources necessary to implement the priorities. As part of this process, it was determined that the scope would be prioritized using the following considerations: regulatory requirements, regional parity, grade level, demographics, financial parity, and program equity.

The financial team was able to further prioritize the goals through a data-driven process that analyzed numerous "what-if" scenarios. This analysis created a better understanding of the District's available funding (HLS funds, local tax funds, energy grants, etc.) in relation to the potential funding streams that could be generated through external sources (bonds, sales-tax, etc.). The team then went through a process of iteration and reiteration to find the optimum/equitable blend of all these considerations to form an ideal strategy to tackle the priorities over a two-phase, 20-year period, using both available and projected funds from a successful referendum.

Long-Term Borrowing Options

	Life Safety Bonds	Working Cash Fund Bonds	Debt / Lease Certificates	Funding Bonds	School Building Bonds	Alternate Revenue Bonds
Repaid from Separate Levy	Yes	Yes	No	Yes	Yes	Yes (as backup)
Issued under DSEB	Yes	Yes	No	Yes	No	No
Voter Approval Required	No	No	No	No	Yes	No
Subject to Backdoor Referendum	No	Yes	No	Yes	No	Yes
BINA Hearing	Yes	Yes	No	Yes	No	No
Max Final Payment (yrs)	20	20	20	20	20	20
Count Toward Debt Limit	Yes	Yes*	Yes	Yes*	Yes	Yes
State/Rgnl Supt. Approval Required	Yes	No	No	No	No	No

* Bonds can be issued in excess of the debt limit at the time of closing but no other bonds may be issued until the total debt is repaid.

Current County School Facility Tax Revenue Estimates

County School Facility Tax Worksheet for Sangamon County Schools
 Debt Capacity and Abatement Impact Per District

1	2	3	4	5	6	7	8	9	10	11	12	13	
County	District	2014 District Total EAV (1)	% of EAV in the County (1)	2014-17 House of Representatives (2)	2014-17 House of Representatives (2)	Percent of Total (3)	Adjusted Annual Rate for 20 Years (4)	Estimated Debt Incurrence with 0% Annual Growth in Sales Tax, 1.25% Cost per District (5)	Annual Growth in Sales Tax, 1.25% Cost per District (6)	Final Maturity of Existing Debt (7)	Fiscal Year 2018 Debt Service per \$100,000 Home County Tax Rate (8)	Effective Abatement 5 Assessed per \$100,000 Home Value Based on Current Tax Rate (9)	
Sangamon	Truittville CUSD 1	96,041,280	100%	288	288	100%	\$466,062	\$4,702,017	\$4,702,017	8/18/2017	\$67,260	\$0.00	\$17,000
Sangamon	Rockwell CUSD 3A	\$26,724,650	99%	2,923	2,923	97%	\$1,656,612	\$16,958,536	\$16,958,536	1/1/2011	\$2,836,340	\$0.00	\$19,385
Sangamon	Brad Chatham CUSD 8	\$78,639,300	100%	4,732	4,732	100%	\$3,231,816	\$33,182,038	\$33,182,038	2/1/2026	\$8,488,019	\$8.44	\$119,000
Sangamon	Pharos of Plains CUSD 8	\$21,670,770	99%	1,260	1,270	100%	\$88,666	\$2,068,222	\$2,068,222	2/1/2025	\$777,108	\$0.36	\$97,900
Sangamon	Adrian CUSD 16	\$11,547,789	100%	1,887	1,887	100%	\$94,618	\$9,798,772	\$9,798,772	12/1/2018	\$641,491	\$0.68	\$141,140
Sangamon	Parsons CUSD 11	\$7,819,634	72%	636	636	100%	\$32,086	\$3,238,090	\$3,238,090	12/1/2017	\$188,413	\$0.27	\$73,770
Sangamon	Wentworth CUSD 14	\$20,778,008	100%	1,492	1,492	100%	\$148,884	\$14,996,000	\$14,996,000	2/1/2021	\$980,880	\$9.79	\$248,770
Sangamon	Williamette CUSD 12	\$177,826,289	98%	1,657	1,653	99%	\$1,067,624	\$11,110,376	\$11,110,376	1/1/2021	\$1,630,000	\$0.60	\$164,000
Sangamon	New Berlin CUSD 16	\$182,101,460	98%	824	808	98%	\$62,260	\$6,689,492	\$6,689,492	2/1/2026	\$970,696	\$9.48	\$99,900
Sangamon	Springfield SD 106	\$1,964,703,130	100%	14,709	14,709	100%	\$10,244,026	\$106,693,124	\$106,693,124	2/1/2026	\$7,790,816	\$0.19	\$177,810
City	A. C. Comm. CUSD 282	\$48,931,288	8%	489	489	100%	\$10,021	\$1,042,778	\$1,042,778	1/1/2026	\$447,098	\$0.02	\$4,449
City	Edinburgh CSD 1	\$4,424,701	0%	255	0	0%	\$0	\$0	\$0		\$6,167	\$0.00	\$0.00
County	Van Dyke CUSD 23	\$13,445,868	3%	809	13	0%	\$9,384	\$95,873	\$95,873		\$1,313	\$0.01	\$14,000
Alton	Sangamon Valley CUSD 9	\$8,144,406	39%	709	280	39%	\$19,463	\$2,728,828	\$2,728,828		\$1,628	\$0.19	\$23,170
Alton	North Hill CUSD 34	\$10,010,068	36%	1,496	134	9%	\$16,693	\$1,733,640	\$1,733,640		\$6,832	\$0.18	\$48,400
Alton	Frank CUSD 202	\$165,211,920	9%	1,132	1	0%	\$61	\$9,019	\$9,019		\$1,889.1E	\$0.00	\$0.00
Alton	Alton CUSD 213	\$13,466,169	38%	1,097	412	14%	\$26,615	\$2,994,493	\$2,994,493		\$1,094,409	\$8.24	\$64,600
Alton	Wentz CUSD 6	\$5,454,472	41%	352	148	42%	\$10,129	\$1,715,333	\$1,715,333		\$299,646	\$0.20	\$8,490
	Total	\$4,631,660,687		30,183	100%		\$21,027,231	\$218,764,675					

Value of a Student: 5096
 Prepared by Stifel Nicolaus & Company, Inc. - for additional information contact Tom O'Brien at 800-830-8381 ext 8487
 September 1, 2017

Calendar Year	Adjusted Net CFTF at 1% (1)	% Change
2002	\$1,709,476	N/A
2003	\$1,329,898	-3.9%
2004	\$1,097,716	-5.6%
2005	\$1,011,186	-2.4%
2006	\$1,165,140	1.5%
2007	\$1,349,188	3.3%
2008	\$1,170,073	-1.4%
2009	\$1,819,351	2.8%
2010	\$1,658,370	7.1%
2011	\$3,008,277	1.8%
2012	\$3,603,040	2.4%
2013	\$3,828,324	1.7%
2014	\$1,701,142	7.7%
2015	\$1,308,382	0.1%
2016	\$1,022,311	-3.3%

(1) As reported by 2002 Annual Financial Report and County

(2) Distribution of County resident student as reported by 2002 Full House Report then adjusted for factor of 1% of EAV in the County

(3) Based on 1% sales tax, derived from the Illinois Department of Revenue CFTF data, excluding non-leased area, less 2% State fee

(4) Sample interest rate for illustrative purposes only; should not be taken as a percentage by State to underwrite at these levels

(5) Assumes 80/20 interest rate

The Money Follows the Student

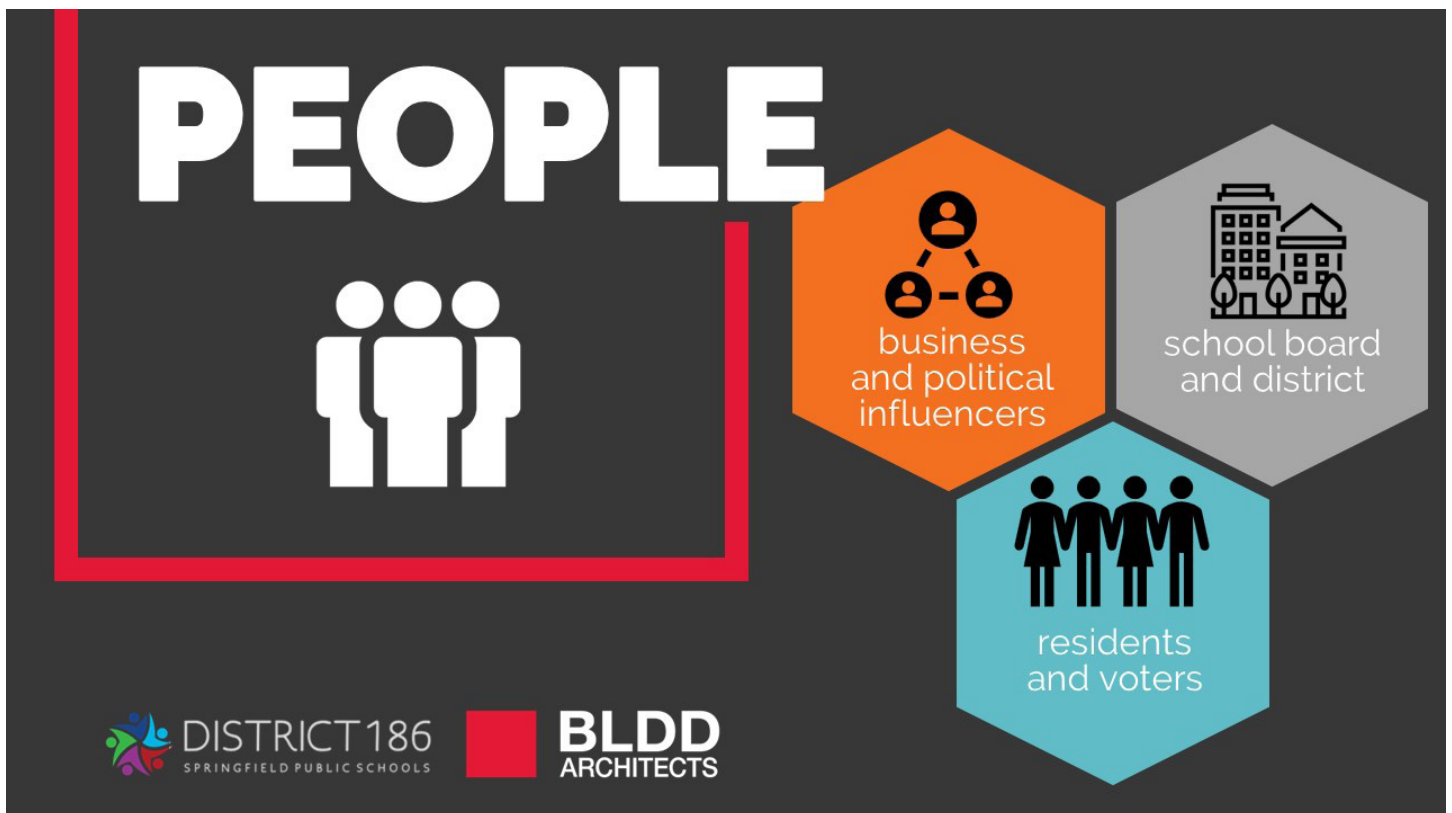
FUNDING THE PLAN

Armed with data-driven analysis, the financial team was able to assess and project the funding needs required to complete the first phase priorities. The district had \$98 million available from HLS funds, local taxes and bonding capacity; however, to achieve the vision set by the district community, approximately \$244 million would be needed for the first phase of implementation. **With all other resources exhausted, the funding gap left the Springfield community with one option: a county-wide 1% sales tax. Springfield needed public support from the majority of the Sangamon County voters to make their vision a reality.**

THE RIGHT PEOPLE; THE RIGHT TIME

The key to generating winning support of a county-wide sales-tax referendum began with assembling a team of the right people at the right time. Through intentional, strategic partnerships, the Springfield district recruited a team of 42 county-wide community leaders, stakeholders, and district employees to volunteer their time to ensure the referendum success. Many of these same committee members were integral to the visioning and planning leading up to the referendum campaign. As a result, **this group had a unique perspective and knowledge of the master plan priorities and implementation timeline. They're also some of the most fierce advocates of the plan.**

Among this group, a steering team comprised of the district superintendent, an additional county superintendent, BLDD Architects representatives, and a representative from each school worked behind the scenes to facilitate and implement the vision of the campaign. The steering group also oversaw the actions of 4 sub-committees: Communication; Finance; Community Outreach; and Canvassing.





8/2/2018

Sangamon County Campaign Plan Draft Timeline

Recruit Leadership at all levels 1. Overall chair or chairs 2. Chair for canvassing/community outreach/communication/fundraising	July 10 - 24
Form and brand campaign committee	July 10 - 24
Begin fundraising activities	July 10 - 24
County wide Campaign Plan Review	Aug 2
County wide Campaign Workshop and Theme and Message Workshop	Aug 14
Begin weekly campaign committee meetings	Aug 15
Vote-Yes Speakers Bureau Starts	Sep 15
Information Mailer #1	Sep 22
Campaign Mailer #1	Sep 24
Early Voting Begins	Sep 27
Yard Signs Drop	Oct 6
Grace Period Registration/Voting Starts	Oct 10
District Mailer #2	Oct 11
Campaign Mailer #3	Oct 12
GOTV Mailer	Nov 1
GOTV Calls	Nov 3 - 6
Election Day/Election Day Calls	Nov 6

VOTE YES! SUB-COMMITTEES

COMMUNICATIONS

The communications sub-committee was the first team created, and they were tasked with developing a theme and message for the referendum campaign. However, creating a united voice for this monumental campaign was quite the undertaking. The theme needed to represent the uniting of an entire county for a common goal, and it had to be grounded in the vision outlined in the master plan that would be realized as a result of a successful campaign. **The referendum campaign was branded “One Sangamon,” with the uniting belief that “when one of us wins, all of us win.”**

With the campaign themed, the efforts could turn to targeted communications that encouraged “yes” voters to make it to the polls. Messaging for these pieces focused on the positive county-wide impact that voting yes would have for “our kids, our county, our future.”

Targeted, multichannel communications were delivered to Sangamon County constituents over the course of two months leading up to election day. The sub-committee worked with the referendum expertise of Unicom ARC and BLDD Architects to craft a strategic and well-researched communications timeline for maximum reach and impact with voters. Collateral materials such as brochures, direct mail pieces, flyers, yard signs, and newspaper ads were created to share the persuasive message in print media. Additionally, tv and radio spots, social media advertising, targeted emails, and automated calling supplemented the print campaign.

A Single Penny Will Bring Ball-Chatham CUSD #5...

- Reduce property taxes by utilizing sales tax revenue to reduce school debt certificates
- Enhance Safety & Security measures in all facilities
- Fund Health Life Safety Needs
- Fund Facility Upgrades and Future Expansion



...it's a simple choice!

For More Information To learn more about what the county school facility sales tax means to you and our school district, go to:

 [facebook.com/onesangamon](https://www.facebook.com/onesangamon)

 www.onesangamon.com

What is the county sales tax for schools?

The county sales tax for schools is a new approach to provide improved school facilities, support local jobs and **shift funding away from property taxes** across Sangamon County. The proposal asks voters to decide on a countywide, one-cent sales tax utilized only for school facilities. The revenue from this sales tax will fund school improvements without increasing property taxes.

How will funds be used?

Funds from this sales tax can be used **only** for maintaining, renovating and upgrading existing school facilities, for new construction and paying off building bonds that can help reduce property taxes. Each school district in the county decides how to use revenues.

How much more would I actually be paying if this passed?

\$100.00 of grocery food	= no increase
\$450.00 TV	= \$4.50
\$15,000 car/truck	= no increase
\$7.00 of fast food	= 7 cents
\$40.00 of medicine	= no increase
\$70.00 pair of shoes	= 70 cents



Vote YES on November 6th!



**OUR KIDS
OUR COUNTY
OUR FUTURE**

VOTE YES! FOR SANGAMON SCHOOLS

AUBURN (EST. \$ 931,591)

Use of Sales Tax Revenue:
Repair roofs, playgrounds, and parking lots
Debt Reduction

BALL CHATHAM (EST. \$ 3,372,085)

Use of Sales Tax Revenue:
Reduce debt certificate payments
Enhance school safety & security
Address building improvement and expansion needs

ROCHESTER (EST. \$ 1,559,370)

Use of Sales Tax Revenue:
Reduce outstanding debt
Enhance school safety and security
Enhance extracurricular facilities
Improve energy efficiency

SPRINGFIELD (EST. \$ 10,027,166)

Use of Sales Tax Revenue:
Enhance safety and security at all schools

le classrooms
; Southeast, and Springfield High Schools
Marsh Elementary on current site
Dell and Laketown
ntary school on new site in that region

T. \$ 391,434)

Revenue:
d security systems
ces, fire alarms and safety cameras
in schools
nd outside facilities
tive options for new vs. repair/renovate plans

(EST. \$ 148,968)

Revenue:
nd future building improvements
fty and security
g debt

LE-SHERMAN (EST. \$ 1,063,167)

Revenue:
curity and Safety
hual Debt Certificate payments
Safety expenses
aintenance on all District Buildings
e over time for District Facility upgrades

SANGAMON VALLEY AND WAVERLY
that live in Sangamon County.

FOR SCHOOL FACILITIES



**OUR KIDS
OUR COUNTY
OUR FUTURE**

VOTE YES! FOR SANGAMON SCHOOLS

ON TUESDAY, NOVEMBER 6TH

Voters in Sangamon County will have the opportunity to vote for a 1 percent sales tax.

The revenue generated by this tax may be used only to improve school facilities or retire new or existing building bonds. Local school districts will control the revenue and may use funds to:

- Provide property tax and debt relief
- Improve safety and security
- Renovate or construct new schools
- Increase the energy efficiency of schools

Revenue raised can only be used in school districts with students that live in Sangamon County. The money raised will follow the students.



VOTE YES WHEN ASKED: "Shall a retailer's occupation tax and a service occupation tax (commonly referred to as a "Sales Tax") be imposed on Sangamon County at rate 1% to be used exclusively for school facility purposes?"

WHAT WON'T BE TAXED?

- Groceries and medicine
- Cars/Trucks/Boats/RVs
- Farm equipment
- Services

HOW MUCH MORE WILL I PAY?

- \$100 of groceries - No change
- \$50 of gas - .50
- \$15,000 car or truck - No change
- \$7 of fast food - .07
- \$40 Prescription Drug - No change



**OUR KIDS
OUR COUNTY
OUR FUTURE**

**JOIN US
TODAY!**

www.onesangamon.com
facebook.com/onesangamon/
onesangamon@gmail.com
P.O. Box 20285
Springfield, IL 62708

MADE FOR BY ONE SANGAMON SCHOOLS

VOTE YES! SUB-COMMITTEES

FUNDING/FINANCE

The One Sangamon Funding/Finance sub-committee worked closely with the steering committee to develop a budget for campaign expenses. This budget allocated \$180,200 for the strategic targeting of campaign tools, advertising, and communications, including multiple direct mail pieces, as well as print, radio, television, social media, and mobile messaging.

With a budget in place, the Funding/Finance sub-committee developed a plan to raise the funds necessary to ensure communication goals and, ultimately, campaign goals were achieved. This plan included a formal “ask” campaign with more than 200 corporate vendors and individuals identified as potential donors to the campaign. Sub-committee members were instrumental in contacting these resources and asking for contributions of both cash funds and in-kind donations.

A key component to this team’s success was found in the influence of those strategic individuals involved with the campaign. The two superintendents requested resources from their loyal district vendors, while those on the steering committee connected to business and industry leaders around the county helped educate their peers about the importance of the campaign and solicited their support.

Throughout the campaign, this team was also responsible for the follow-up and acknowledgment of donors. They also served as the committee treasurers and ensured all campaign documentation was correctly filed.

<u>Sangamon County Campaign Plan – 1st Draft</u>	
Tentative Budget	
Campaign Committee	<u>Estimated Cost</u>
Voter File Development/App	\$2000
Direct Mail #1 (50,000 targeted households)	
Printing	\$7500
Handling	\$2000
Postage	\$11500
Direct Mail #2 (50,000 targeted households)	
Printing	\$7500
Handling	\$2000
Postage	\$11500
Direct Mail #3 (50,000 targeted households)	
Printing	\$7500
Handling	\$2000
Postage	\$11500
Canvass/Volunteer Program	
Print Walk Lists	----
Canvass Brochure/doorhanger (60,000 pieces)	\$9000
Count-On-Me Forms (10000)	\$1200
I-Have-A-Question Forms (1000 pieces)	500
Lapel Stickers (25,000 pieces)	\$3000
Campaign Buttons	TBD
GOTV/follow-up mail	\$14000
Yard signs/stakes (4000)	\$10000
GOTV Phoning	Volunteers
FAQ reproduction	\$500
Campaign office expense	\$1000
Advertising Print	\$20000
Advertising Radio	\$15000
Advertising Television	\$30000
Robo-Calls	\$2000
Social Media	\$2000
Outdoor	----
Transit	----
Graphics/Production Fees	\$5000
Miscellaneous/Contingencies	\$2000
Total	\$180,200



OUR KIDS OUR COUNTY OUR FUTURE

VOTE YES FOR SANGAMON SCHOOLS

Dear Todd -

It was nice talking to you about the One Sangamon Schools effort, and thank you for considering this request.

As we discussed, we are the citizen's group that's working to help the school districts of Sangamon County (Athens, Auburn, Ball Chatham, Springfield, Williamsville, Riverton, Rochester, New Berlin, Pawnee, North Mac, Tri-City, Pleasant Plains, PORTA) pass the one percent County Facilities Sales tax, creating a new funding stream for public school districts; it's a remarkable opportunity for the school districts in the County, and we do not want to miss it for lack of effort!

So we are asking supporters like you to help us make an effective and persuasive campaign, by making contributions to help cover the cost of the required communications. Here are some of the communications and costs that we have planned:

Bigger Expenses:

- Direct mail informing the public about the plan - \$7500 copying; \$2000 handling; \$11,500 postage (this is the cost for each piece). We are trying to send 2 or 3 direct mail pieces to 50,000 households: \$40,000 - \$60,000
- Print advertising: \$20,000
- Radio Advertising: \$15,000
- Television advertising: \$30,000

Smaller Expenses:

- Yard signs: 4000 planned at \$2.50 each. \$10,000
- Canvas Brochure / Door Hangers: 60,000 planned @ .12 each. \$7,200
- "Count on Me" forms: 60,000 planned @ .12 each. \$7,200
- "I have a question" forms: 1,000 planned @ .50 each. \$500
- Lapel Stickers: 25,000 planned @ .12 each. \$3,000

As you can see, our communications plan is ambitious, but this goal warrants our best efforts. As I mentioned on the phone, all donations are gratefully appreciated!

Thanks again for considering this request to support the school districts of Sangamon County!!

VOTE YES! SUB-COMMITTEES

COMMUNITY OUTREACH

The Community Outreach sub-committee played a pivotal role in connecting the One Sangamon campaign with outlets to **share the “vote yes” message in public speaking forums and in community groups**. As part of this initiative, the sub-committee worked closely with the Sangamon County Speakers Bureau to recruit and train volunteers and identify speaking opportunities.

Additionally, this team was charged with soliciting parties to write persuasive Letters to the Editor in support of the campaign’s vision and impact. Committee members also identified constituents who would display “vote yes” yard signs in support. And last, this team was responsible for assisting in voter registrations and recruiting poll greeters to assist with distributing information on election day.

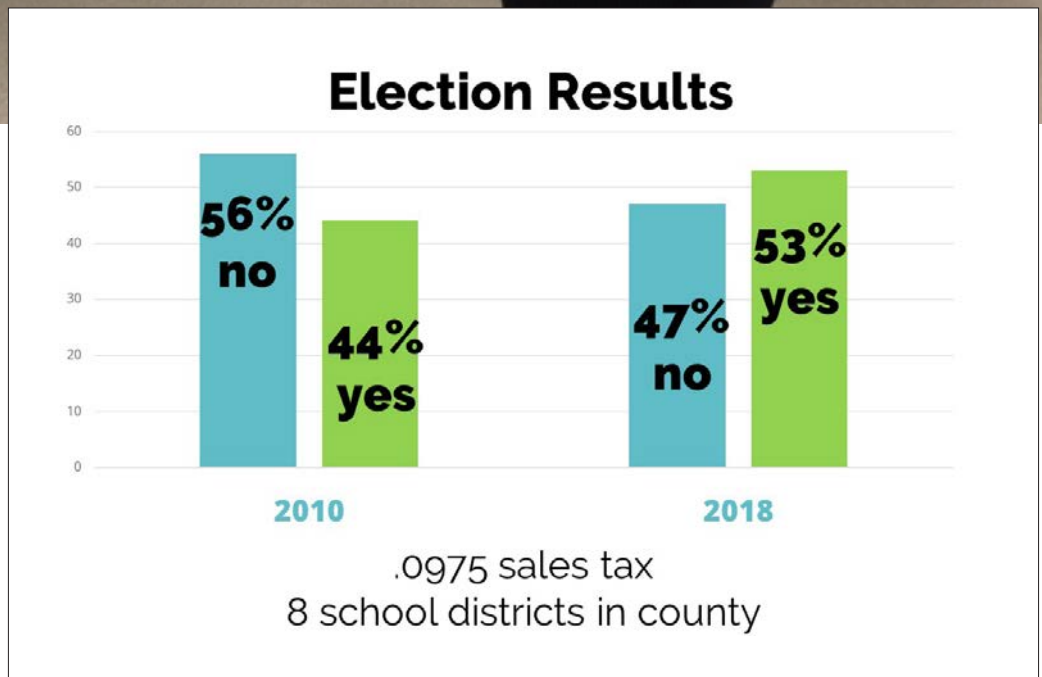
CANVASSING

The final sub-committee was a group of individuals dedicated to finding the “yes” votes in Sangamon County with Canvassing efforts. **Through a method of strategic targeting and list development, the District knew it would need to receive approximately 44,000 votes (or 24,500 “yes” households) to pass this referendum.** School improvement referendums are often won through grassroots efforts, and vigorous door-to-door canvassing powered by an army of volunteers is the surest way to gain success.

Over the course of 4 Saturdays leading up to election day, dozens of campaign supporters rallied to knock on neighborhood doors and encourage voters to get to the polls. The conversations were kept informative, as the goal was not to convince “no” voters to change their minds or to knock on every door; rather, canvassers focused on identifying and encouraging those who would be supportive of the referendum on election day to get out and vote.

TIME TO CELEBRATE!

Following two years of visioning, planning, and campaigning, voters passed the One Sangamon referendum in support of a 1% sales-tax increase to fund school facilities. A testament to the efficacy of the steering committee, messaging, and overall campaign efforts, voters showed up at the polls to voice their support of the importance of creating safe, equitable and future-focused learning environments for the county's students. **The referendum passed by a margin of 53% to 47% and was the first successful referendum in Sangamon County since 1984.**





DISTRICT 186
SPRINGFIELD PUBLIC SCHOOLS

OUR SCHOOLS OUR FUTURE

FUNDING
SUPPLEMENTAL
INFORMATION

BOND BASICS AND BORROWING CAPACITY

STIFEL

Bond Basics and Borrowing Capacity
Presentation to Springfield Schools 186

September 6, 2017

Anne Noble
 Managing Director
 Stifel, Nicolaus & Company, Inc.
 (314) 342-8488
 noblea@stifel.com

STIFEL

Section I:
Property Tax Supported Borrowing Options

STIFEL

Bond Basics

- A Bond is similar to a mortgage for a school district.
- Bonds are sold to investors in \$5,000 increments.
 - ✓The investor loans the district principal and receives interest semi-annually until principal is repaid.
- Principal + Interest = Debt Service
- Bonds are issued with tax-exempt or taxable interest rates.
 - ✓Tax-exempt interest on the Bonds is not included in the gross income of the bondholder for federal income tax purposes.
 - ✓Generally, capital projects qualify as tax-exempt.
 - ✓Often, borrowing for operations requires taxable interest rates.

3

STIFEL

Bond Basics

10-Year "MMD" and 10-Year Treasury since 1/1/2007

4

STIFEL

Why School Districts Borrow

- To pay for capital projects
- To pay for operating needs that cannot be currently met with annual revenues
- To refund existing debt for savings or restructuring purpose

5

STIFEL

Three Fundamental Questions for Borrowing

- Is the proposed borrowing politically feasible?
- Is the proposed borrowing financially feasible?
- Is the proposed borrowing legal?
 - ✓ Non-Home rule Governmental Units (school districts) may exercise only the powers which are expressly granted by the legislature or powers which are necessarily implied or incident to those powers which are expressly granted (Dillon's Rule).
 - ✓ If the power to borrow is neither expressly granted by statute nor necessarily implied, it does not exist.

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BOND BASICS AND BORROWING CAPACITY

Statutory Debt Limit STIFEL

- 6.9% of Equalized Assessed Value (EAV) for elementary and high school districts
- 13.8% of EAV for unit school districts
- Debt Limit includes the par amount of Bonds and Capital Leases
- Certain exceptions exist for bonds that do not fall within a district's debt limit.
 - Exploding enrollment
 - Legislative exceptions
 - Alternate Revenue Bonds and other bonds not supported by the property tax levy

7

Springfield 186 Debt Limit Calculations STIFEL

EAV History		
Levy Year	EAV	% Change
2010	\$ 1,919,953,759	-
2011	1,923,218,246	0.17%
2012	1,924,709,030	0.08%
2013	1,936,430,584	0.61%
2014	1,925,990,348	-0.54%
2015	1,936,911,384	0.52%
2016	1,964,730,130	1.48%
2016*	2,035,577,624	
*Includes TIF		

Debt Capacity	
2016 EAV	\$ 2,035,577,624
	x
	13.8%
Debt Limit	280,909,712
	-
Outstanding Debt	\$60,200,000
Remaining Debt Capacity	\$ 220,709,712

*Debt Capacity is the maximum legal borrowing limit according to Illinois Statutory provisions.

8

Referendum Bonds STIFEL

- Public question posed to the registered voters of the district as to whether the bonds should be issued
 - ✓ Majority vote is necessary to authorize the bonds
- Timeline
 - ✓ Substantial length of time needed to pass a referendum
 - ✓ Election Code requires action several months before election
 - ✓ Must wait for expiration of election contest period before issuing bonds
- Ballot language limits use of bond funds

9


Referenda Calendar STIFEL

Election	March 20, 2018 (General Primary)	November 6, 2018 (General Election)
Board Adopts Election Resolution	January 2, 2018	August 20, 2018
Local Election Official Certifies Question to Election Authorities	January 11, 2018	August 29, 2018
Election Authorities Publish Election Notice	March 10, 2018	October 26, 2018
Election Held	March 20, 2018	November 6, 2018
Canvass by Election Authority	April 10, 2018	November 27, 2018

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PTELL and Bonds STIFEL

- School districts subject to the Property Tax Extension Limitation Law of the State of Illinois, as amended ("PTELL"), are permitted to issue **non-referendum** bonds payable from a separate property tax levy (Debt Service Extension Base or "DSEB") that is unlimited as to rate, but limited as to amount (i.e., Limited Bonds).



11

Non-Referendum Bonds STIFEL

- The District has a Debt Service Extension Base (DSEB) of \$7,874,211
 - Enables the District to issue various types of non-referendum bonds
 - Working Cash (capital projects or working capital)
 - Life Safety
 - Funding
 - Tort
- Annual debt service payments may not exceed the DSEB
 - Maximum length of maturity is 20 years
- The District currently has three bond issues outstanding against its DSEB

12

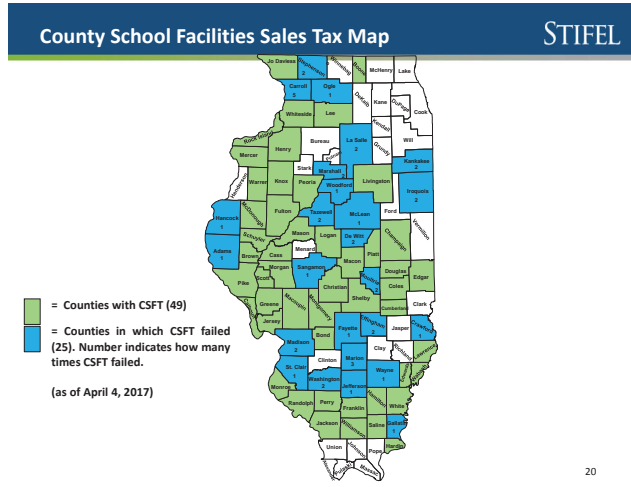
BOND BASICS AND BORROWING CAPACITY

County School Facility Tax – Nontraditional Approach for Illinois Public Schools

STIFEL

- Sales tax vs. Real Estate tax for school capital
 - Allows county voters to approve a sales tax to fund school facility costs
 - 1% maximum in ¼% increments
- Law went into effect October 2007
- Law was based on similar law that is currently in place in every county in Iowa
- Law was amended in August 2011
 - County Board no longer has to approve the tax

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County School Facility Tax – What is Taxed

STIFEL

- Sales Tax Base:
 - Everything in the municipal and county sales tax base is included in the tax base **except for**:
 - Cars, Trucks, ATVs
 - Boats & RVs
 - Mobile homes
 - Unprepared Food
 - Drugs (including over-the-counter and vitamins)
 - Farm Equipment and Parts
 - Farm Inputs
 - Services are not taxed
- If it is not currently taxed, it will not be taxed

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County School Facility Tax – Uses for Revenue

STIFEL

Uses of Sales Tax	Ineligible Uses
New Facilities	Direct Instructional Costs
Additions & Renovations	Text Books
Security, Entrances, Safety, Disabled Access	Buses
Technology Infrastructure	Detached Furniture & Fixtures
Architectural Planning	Computers
Durable Equipment (non-moveable items)	Moveable Equipment
Fire Prevention and Life Safety	Operating Costs
Land Acquisition	Salaries and Overhead
Energy Efficiency	
Parking Lots	
Demolition	
Roof Repairs	

Refund Bonds or Abate Property Taxes Levied to Pay Bonds Issued for Capital Purposes

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County School Facility Tax – Revenue Distribution Logistics

STIFEL

- Revenue is distributed equally for every pupil who lives in the county and attends public school, regardless of the location of that school.
- EAV used herein simply to estimate enrollment within the county (i.e. the ratio of EAV in the county equals enrollment in the county).
- Real revenue distribution is based on actual enrollment in County as certified to ROE each Fall.

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Current County School Facility Tax Revenue Estimates

STIFEL

County	2014 Revenue Total	% of EAV in County	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	2014 Total Enrollment	
Adams	1,100,000	0.1%	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	100,000	
...
Total	56,612,893.87*	0.7%	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180	36,180

* As reported by STIFEL Annual Financial Reports and Census
 ** Based on 2014 Census estimates as reported by STIFEL
 *** Based on 2014 Census estimates as reported by STIFEL
 **** Based on 2014 Census estimates as reported by STIFEL
 ***** Based on 2014 Census estimates as reported by STIFEL

The Money Follows the Student

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BOND BASICS AND BORROWING CAPACITY

Example CSFT Borrowing Capacity STIFEL

EAV Year	Tax Year	Fiscal Year	2019 Debt Svc.	CSFT Revenue	CSFT Coverage	2019 Debt Svc.	Total Debt Svc.	Tax Rate	2019 Debt Svc.	Total Debt Svc.	Tax Rate
2017	2018	2019									
2018	2019	2020	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2019	2020	2021	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2020	2021	2022	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2021	2022	2023	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2022	2023	2024	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2023	2024	2025	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2024	2025	2026	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2025	2026	2027	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2026	2027	2028	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2027	2028	2029	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2028	2029	2030	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2029	2030	2031	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2030	2031	2032	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2031	2032	2033	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2032	2033	2034	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2033	2034	2035	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2034	2035	2036	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2035	2036	2037	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2036	2037	2038	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
2037	2038	2039	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250	8,195,701	10,244,626	1.250
Totals			111,882,248	133,916,016		111,882,248	204,802,520		111,882,248	204,802,520	
PV Par Amount			111,882,248			PV Par Amount	108,956,644		PV Par Amount	106,609,155	
Example Interest Rate			4.00%			Example Interest Rate	4.25%		Example Interest Rate	4.50%	

*Stifel is not making any assumptions on CSFT growth.
 **Must take into account Capitalized Interest and Costs of Issuance before estimating project fund
 1. Preliminary and subject to change.
 2. The use of the "A2" rating is consistent with the rating of the outstanding bonds
 3. Interest rate assumptions are based on current market conditions and similar credits.
 4. Actual results may differ, and Stifel makes no commitment to underwrite at these levels.

County School Facility Tax – How to Place Before Voters? STIFEL

- School boards pass a resolution
- When School Boards representing more than 50% of the resident student enrollment in the county adopt resolutions, the Regional Superintendent **must** certify the question to the County clerk
- County Clerk will place on the ballot at the next regularly scheduled election

County School Facility Tax – Required Language on the Ballot STIFEL

Ballot Language (cannot change):

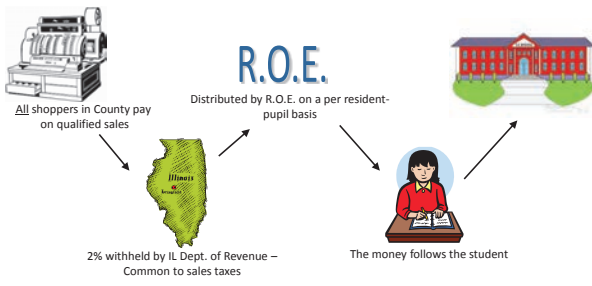
Shall a retailer's occupation tax and a service occupation tax (commonly referred to as a "Sales Tax") be imposed in (name of county) at a rate of ___% to be used exclusively for school facility purposes?

County School Facility Tax – Implementation STIFEL

- Simple majority of votes cast needed to pass
- After approval by the voters, the tax will be imposed
- The ordinance and the election results must
 - Be certified by the County Clerk
 - Filed with the Illinois Department of Revenue
- Money is received monthly beginning approximately four months after the tax goes into effect
- The money follows the student

County School Facility Tax – Distribution of Sales Tax STIFEL

Revenues do not flow through the Illinois General Assembly budget process and are not subject to cuts similar to what districts currently experience relating to State Aid.



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**Sangamon County Sales
Tax Referendum**

Campaign Plan/Draft 1

July 14, 2018

SANGAMON CO. SALES TAX REF. PLAN

Sangamon County Campaign Plan – 1st Draft

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I) Overview

On November 6, 2010, voters in Sangamon County, Illinois will vote on a sales tax increase proposal earmarked for school district capital improvement programs. In the Springfield Public Schools revenue from this new tax will be used to finance the first step in implementing the District's long term facility improvement plan. Other districts in Sangamon County are contemplating using their share of the revenue to either improve facilities, provide property tax relief for the existing bond debt on previously improved facilities or some combination of those two things.

The history of countywide sales tax referenda for education is not particularly positive in the state of Illinois: proposals have tended to lose rather than win. But having said that, nearly half the counties in Illinois have passed this tax including all counties that touch Sangamon but one.

With multiple school districts in a county, past efforts have been weakened by the inability or unwillingness to put together a top-down, coordinated campaign. Oftentimes the overall campaign was the net result of multiple campaigns run by multiple school districts with some activities being effective, some being ineffective and a waste of time, while other activities counterproductive and damaging to the overall effort. While campaigns, by their very nature, benefit from high levels of volunteerism, this volunteer work must be structured by a well-designed campaign plan with top-down discipline. Unless this happens in Sangamon County, overall chances for success are not good.

There are currently 132,992, registered voters in Sangamon County. Off-cycle (non-presidential) turnout in Illinois is usually in the 50% range (in 2014 statewide turnout was 49%). With this November's statewide races having the potential of being quite controversial, not to mention the national political mood, we are estimating turnout, on the high side, to be approximately 60%. If so, it will take approximately 40,000 votes to win in November.

$$132,992 \times .60 \text{ (turnout)} = 79,795$$
$$79,795 / 2 = 39,898 \text{ (votes to win)}$$

Nearly 55% of the registered voters are in the Springfield School District.

<u>District</u>	<u>Registered Voters</u>	<u>% of Total</u>	<u>Cum %</u>
Springfield SD 186	72977	54.9	54.9
Ball-Chatham CUSD 5	19554	14.7	69.6
Rochester CUSD 3A	8013	6.0	75.6
Pleasant Plains CUSD 8	5893	4.4	80.0
Williamsville CUSD 15	5491	4.1	84.1
Riverton CUSD 14	4746	3.6	87.7
Auburn CUSD 10	4462	3.4	91.1
New Berlin CUSD 16	4238	3.2	94.3
Tri-City CUSD 1	2502	1.9	96.2

SANGAMON CO. SALES TAX REF. PLAN

Sangamon County Campaign Plan – 1st Draft

Pawnee CUSD 11	2119	1.6	97.8
Athens CUSD 213	1260	0.9	98.7
Sangamon Valley CUSD 0	859	0.6	99.3
North Mac CUSD 34	687	0.6	99.9
Waverly CUSD 6	161	0.1	100.0
A-C Central CUSD 262	16	0.0	100.0
Mt. Pulaski CUSD 23	11	0.0	100.0
Porta CUSD 202	3	0.0	100.0
Edinburg CUSD 4	0	0.0	100.0
Total	132,992		

It is always safe to base targeting numbers on an overestimation of the work to be done. So for targeting purposes, in this plan, our goal is to reach a 55% favorable vote assuming a 60% turnout.

$$132,992 \times .60 \text{ (turnout)} = 79,795 \times .55 \text{ (favorable vote)} = 43,888$$

So the goal is to obtain 44,000 or more votes in November. This is approximately 33% of the total number of registered voters in Sangamon County. Further, 44,000 votes can be found in approximately 24,500 households. One of the essential “mindsets” to winning an election is thinking about 24,500 households rather than 132,992 voters.

II) Campaign Structure

Leadership Team

As noted earlier, it is imperative to have a structured, organized and highly disciplined campaign effort. To facilitate this, an overall “Leadership Team” should be formed. This committee should be comprised of:

- overall chair or co-chairs (ideally with at least one from Springfield and one from outside of Springfield)
- campaign manager
- the Springfield superintendent
- a superintendent representing at least one other district
- chair of the fundraising committee
- chair of the communications committee
- representatives of consulting firms

This Leadership Team will be responsible for reviewing, amending and adopting this campaign plan.

Steering Committee

In addition to the Leadership Team, there will be a Steering Committee. The Steering Committee will be comprised of the Leadership Team and representatives of each school district (the superintendent and one citizen liaison).

The Steering Committee and its members will be responsible for identifying those individuals in each district who will implement the campaign plan as it relates to the individual districts. Each district should have a canvassing committee and a community outreach committee.

The Steering Committee will meet on a regular basis to report on each district's progress in implementing its portion of the overall plan. This Committee will also provide an opportunity for input/feedback to the Leadership Team.

The structure of the Vote Yes Committee shall be as follows: Countywide — there is a Communications Committee and a Fundraising Committee. In each district, there should be a canvassing committee and a community outreach committee. Once this leadership is in place, along with the overall chairs and campaign manager, a training session should be held. This needs to be done ASAP.

III) Theme and Messages

One of the first tasks of the Leadership Team, through its communications committee, is to determine theme and message for the campaign so that all campaign communications are coordinated and in a single voice. Oftentimes, the single biggest reason for a loss at the polls is lack of a focused message, resulting in a lot of communications but failure to deliver a persuasive message.

Theme/message is a significant idea or thought you want your audiences to know, understand, remember and if used properly, repeated. Effective key messages lead voters to the desired behavior, action, attitude change and awareness. The theme and messages for the campaign provide the “road map” for all aspects of a successfully managed campaign.

Important elements of effective themes and key messages are:

- Truthful and accurate
- Concise and simple
- Related in human terms
- Connect with people's emotions - powerful, clear, and consistently repeated

For purposes of defining theme and message, we commend coordinating a theme and message workshop in coordination with the campaign's Communication Subcommittee.

Once the theme and messages are determined, these key communication pieces will be incorporated into all aspects of the communication strategies.

IV) Targeting/Canvassing

School referenda are won at the grassroots level. The best method to assure a victory in November is to conduct a vigorous door-to-door canvass program to targeted households. For this campaign, one targeted household should be identified for every vote that is needed — so the goal is to target 44,000 “yes” households.

Canvassing — The Simple Math of Winning Elections

Our goal would be to identify 44,000 favorable households by Election Day. Why that number? With approximately 1.80 voters per household, this would produce 79,200 identified “YES” voters. If approximately 60% percent of those identified actually go to the polls (assuming an aggressive get-out-the-vote program), that would produce 47,520 actual “YES” voters on Election Day — enough for winning the referendum.

For each school district in the county, the canvass program to identify these voters could be run from any type of community center or other central location. If some type of rent payment was made, the canvass could run from a public high or middle school. Canvassing would occur on four Saturdays (roughly from 8:30 a.m. to 1:00 p.m.). To reach our target goal, approximately 1,760 volunteers would be needed on each of the four Saturdays (apportioned across all districts). Following the canvass program, a volunteer GOTV phone and follow-up mail program should be implemented to the identified favorable households.

**A good rule of thumb in campaign programs like this is:
If you can’t count it — it didn’t happen.**

This canvass program produces weekly, quantifiable results. It allows the campaign to statistically track progress, and increase efforts in areas where support might be soft. Even with a relatively small number of volunteers, the number of identified favorable households will literally explode in size following four weeks of canvassing.

Consider the following numbers:

132,992	Registered Voters
<u> x 60%</u>	Estimated Turnout
79,795	Turnout on Election Day

79,795	Turnout on Election Day
<u> x 55%</u>	Goal for Passing Referendum
43,888	Goal for Number of Votes

SANGAMON CO. SALES TAX REF. PLAN

Sangamon County Campaign Plan – 1st Draft

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880 Teams Per Saturday (1660 volunteers)
 x 4 Number of Saturdays Canvassing
 3,520 Total Canvass Teams

3,520 Total Canvass Teams
 x 12.5 Favorable Households Per Day/Per Team
 44,000 Total Favorable Households

44,000 Total Favorable Households
 x 1.80 Voters Per Household
 79,200 Identified Favorable Voters

79,200 Identified Favorable Voters
 x .60 Estimated Turnout Of ID'ed "YES" Households
47,520 Favorable Votes On Election Day

This strategy provides a margin of 3,632 votes above our estimate of votes need to win o for Election Day.

County Targeting

District	<u># Registered</u>	<u>% of Total</u>	<u>Weekly Teams</u>	<u>Weekly HH</u>
Springfield SD 186	72977	54.9	484	6050
Ball-Chatham CUSD 5	19554	14.7	130	1625
Rochester CUSD 3A	8013	6.0	52	650
Pleasant Plains CUSD 8	5893	4.4	39	488
Williamsville CUSD 15	5491	4.1	36	450
Riverton CUSD 14	4746	3.6	32	400
Auburn CUSD 10	4462	3.4	30	375
New Berlin CUSD 16	4238	3.2	28	350
Tri-City CUSD 1	2502	1.9	17	212
Pawnee CUSD 11	2119	1.6	14	175
Athens CUSD 213	1260	0.9	8	100
Sangamon Valley CUSD 0	859	0.6	5	62
North Mac CUSD 34	687	0.6	5	62
Waverly CUSD 6	161	0.1	1	12
A-C Central CUSD 262	16	0.0	0	0
Mt. Pulaski CUSD 23	11	0.0	0	0
Porta CUSD 202	3	0.0	0	0
Edinburg CUSD 4	0	0.0	0	0
Total	132,992	100%	881	11,011

Summary of Targeting

This targeting strategy, if implemented, will produce 47,520 “yes” votes — considerably above what is needed.

While the total number of teams seems intimidating, for Springfield Public Schools — with 32 schools (not counting early childhood and other programs) — it comes to 15 or 16 teams per Saturday or 30-32 volunteers. Eight teachers each recruiting three parents gets to 32. Ball Chatham will need approximately 40 volunteers from each of its six buildings.

The Program Details

This program will require the assembly of canvass packets that contain computer generated walk lists, a canvass brochure, door hangers, instructions, “Count-On-Me” forms, “I-Have-A-Question” forms, maps, and fact sheets. Canvassing should be scheduled for four weekends *regardless of bad weather*.

There is a canvassing app that is available so volunteers can canvass using lists and maps on their smart phones. We highly recommend that the campaign look into acquiring this app.

Volunteers should canvass in teams — ideally one teacher and one parent per team. Canvassing in teams has many advantages:

- It is more fun.
- It is more effective (instructions are followed) and persuasive (the medium is the message).
- It is more efficient — because in the long run, people will volunteer to canvass more than one time.
- It is safer.
- It makes it easier to recruit volunteers.

For the canvass program to work, the following tasks must be completed:

- Task 1: Produce computer generated walk lists/canvass lists from a current voter registration list. It would be best if this list differentiated between district parent and non-parent households Efforts should be made to target high turnout households. Again, we strongly recommend the campaign investigate the use of a smart phone app for canvassing.
- Task 2: District administrators should be briefed, as early as possible, about the

- Task 3: Recruit canvass captains (one at each school to recruit canvass teams and to help organize canvass kits by township and precinct).
- Task 4: Volunteers will be asked to canvass in teams. Ideally, each team should have a teacher and a parent.
- Task 5: Canvass materials will be needed: a brochure, a "I Have A Question" form, a "Count-On-Me" form, a map, directions, and a canvass script.
- Task 6: Canvass packets must be assembled. This involves matching up the walk lists with a map, and making sure each packet has all the needed materials.
- Task 7: Follow-up on canvassing would increase the campaign effectiveness: thank you letters to "yes" households, yard sign distribution, and responding to "I Have A Question" forms.
- Task 8: A location should be secured for Get-Out-The-Vote calls to "YES" households the weekend before the election.
- Task 9: Canvass captains will need to be trained so they can train volunteers on each Saturday of canvassing.

V) Communications Materials (District and Vote Yes)

NOTE: items in red are activities implemented and paid for by the VOTE YES committee. Dates may need to be adjusted to meet production deadlines and printing constraints.

Direct Mail Pieces

1. Two for each district — dropped in mail on Sep 24 and Oct 11 - Informational Mailers - Two (1) 8.5 x 11; 2-sided, color brochure sent to district registered voters. (Information, description of how money will be used, Frequently Asked Questions, etc. and direct to early voting location and dates)
2. Countywide by Yes Committee — Dropped in mail on Oct 18, Oct 25 and Nov 1 - VOTE YES Mailers - Three (2) 12 x 5; 2-sided, color postcards sent to registered voters. Included in this targeted list should be most parent households. (Get Out the Vote and direct to early voting location)
3. Doorhanger/brochure 2-sided, color, used for canvassing on , Oct 12, Oct 19, Oct 26 and Nov 2. Piece is printed, half with cut for hanging on doors, and half with hanger dye cut removed to be handed to those people who are home during canvassing.

Yard Signs/Window Signs

1. Distribute yard/window signs (same sign used as a yard sign or window sign)

Social Media (weekly and daily scheduled postings)

1. Utilize website for information about referendum; FAQ and photos, early voting information, links to the districts' Facebook page, history of the ballot proposal, etc. Utilize Facebook to generate interest; conversations and direct to website for information. Social media consumes a lot of "content." The more visual and compelling the content, the more effective social media can be as a communications tool. Good pictures and compelling video clips can be extremely effective. **(Note: make sure all districts are fully aware of recent "rule" changes at Facebook — this is imperative)**
2. Utilize social media to continue efforts to encourage residents to register to vote, to early vote beginning on Sep 27, and beginning of grace period registration and voting on Oct 10.
3. It is recommended to further increase the effectiveness of Facebook pages by purchasing Facebook advertising. The cost is minimal and has proven to be highly effective in increasing the "reach" for Facebook posts to targeted audiences. (Again, be informed about the Facebook rule changes)
4. Emails to support individuals and groups should be sent to support the districts' social media effort. Those receiving emails should be "trained" at "liking" our page and "sharing" the content over the course of the overall efforts.

Flyers

1. Sep 22 - Distribute "Vote Early" flyer to encourage residents to register to vote and to early vote beginning on Sep 27.
2. Remember to Vote flyer on Nov 2.

Telephone Calls

1. **Nov 3-6 — Reminder phone calls and Get-Out-The-Vote calls to remind supporters to vote on Election Day.**

Internal Communications

1. Utilize all tools available to inform employees of referendum details. Letter or call from the superintendent, email, in-person visit by the superintendent at staff meetings, etc. Employees are your best ambassadors and it is critical they understand the improvement plans, referendum details, and how this will impact their district.

Paid Media

1. **If funding allows, the campaign should explore print, radio and television media buys. Given the size of the county and the overlap of the county and the Springfield media market, paid electronic advertising should be very efficient.**

November elections usually attract lots of political advertising, so purchases should occur early enough to assure good placements. We recommend contacting a media buying firm in Springfield to put develop an effective media buying strategy.

Early Voting Information

<https://www.elections.il.gov/ElectionInformation.aspx?ID=fVXMG%2F6Be8g%3D>

Grassroots Efforts

In addition to the door-to-door/phoning effort, the following other grassroots programs are also suggested:

1. A Speakers Bureau to meet requests for presentations from various organizations. As a handout, volunteer speakers should have a business-card sized handout with the contact information for the campaign Facebook page or other communication tools.
2. Emails to various community groups list. (ex. Rotary sends Vote Yes email to their membership list)
3. Programs to collect endorsements from major individuals and organizations in the community — stimulating member-to-member communications among these groups.
4. Programs to secure support from the religious community.

Earned Media – News Releases, Photo Opportunities, Personal Interviews:

News releases and photo opportunities should be coordinated to provide local media with complete information about the referendum. This can be done from both the district and committee sides. In addition, efforts should be made to generate a steady stream of news items from the campaign, i.e. endorsements, special events, feature articles for print and radio.

Also, as part of the earned media program, a strategy should be developed to achieve editorial support from the area’s media outlets that endorse in these types of elections.

VI) Get-Out-The-Vote Program

In order to maximize voter turnout among “yes” voters, it is critical the campaign mount an aggressive “get-out-the-vote” (GOTV) effort beginning on the weekend before election day. Building on the success of the canvassing effort, postcards can be mailed to identified supporters, and volunteers will place phone calls to supporters reminding them to vote on election day.

It also very important for the districts to communicate early voting dates and deadlines to staff, volunteers and other supporters. All should be reminded that they can early vote.

SANGAMON CO. SALES TAX REF. PLAN

VII) Calendar

Following agreement on the tasks outlined in this campaign plan, the chair, along with the campaign consultants should develop a comprehensive calendar. What follows is a tentative calendar.

Recruit leadership at all levels	Jul 10-24
a. overall chair or chairs	
b. chair for canvassing/community outreach/communications/fundraising	
Form and brand campaign committee	Jul 10-24
Begin fundraising activities	Jul 10-24
Training date for campaign committee leadership and members	Aug 1-15
Begin weekly campaign committee meetings	Aug 8
Begin informational communications from District/social media	Aug 15
Vote-Yes Speakers Bureau Starts	Sep 15
Information Mailer #1	Sep 22
Campaign Mailer #1	Sep 24
Early Voting Begins	Sep 27
Yard Signs Drop	Oct 6
Grace Period Registration/Voting Starts	Oct 10
District Mailer #2	Oct 11
First of 4 Canvass Saturdays	Oct 12
Campaign Mailer #2	Oct 18
Campaign Mailer #3	Oct 25
GOTV Mailer	Nov 1
GOTV Calls	Nov 3-6
Election Day/Election Day Calls	Nov 6

SANGAMON CO. SALES TAX REF. PLAN

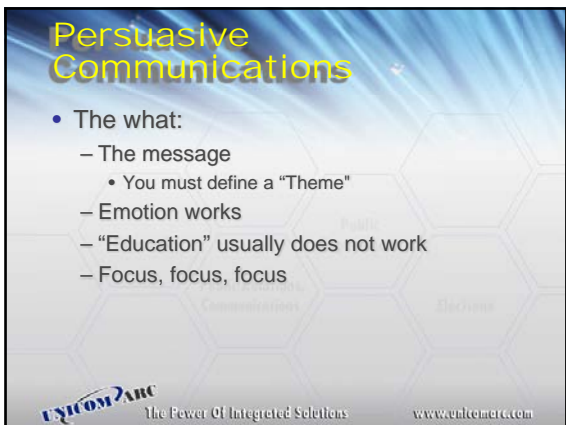
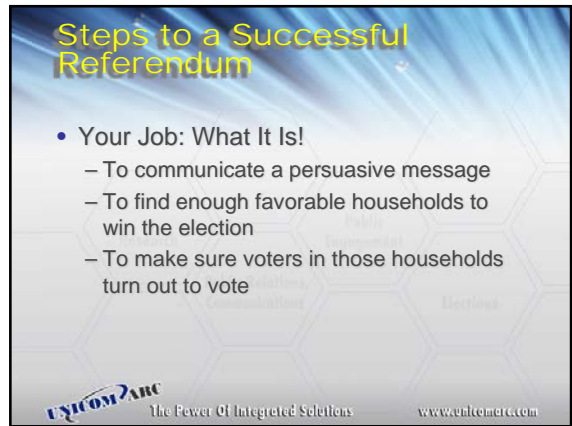
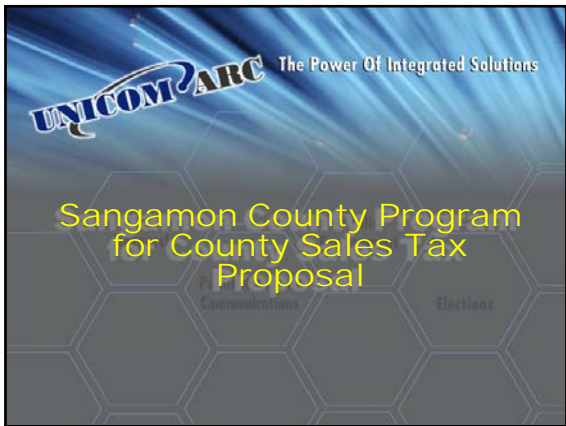
Sangamon County Campaign Plan – 1st Draft

12

Tentative Budget

Campaign Committee	<u>Estimated Cost</u>
Voter File Development/App	\$2000
Direct Mail #1 (50,000 targeted households)	
Printing	\$7500
Handling	\$2000
Postage	\$11500
Direct Mail #2 (50,000 targeted households)	
Printing	\$7500
Handling	\$2000
Postage	\$11500
Direct Mail #3 (50,000 targeted households)	
Printing	\$7500
Handling	\$2000
Postage	\$11500
Canvass/Volunteer Program	
Print Walk Lists	-----
Canvass Brochure/doorhanger (60,000 pieces)	\$9000
Count-On-Me Forms (10000)	\$1200
I-Have-A-Question Forms (1000 pieces)	500
Lapel Stickers (25,000 pieces)	\$3000
Campaign Buttons	TBD
GOTV/follow-up mail	\$14000
Yard signs/stakes (4000)	\$10000
GOTV Phoning	Volunteers
FAQ reproduction	\$500
Campaign office expense	\$1000
Advertising Print	\$20000
Advertising Radio	\$15000
Advertising Television	\$30000
Robo-Calls	\$2000
Social Media	\$2000
Outdoor	-----
Transit	-----
Graphics/Production Fees	\$5000
Miscellaneous/Contingencies	\$2000
Total	\$180,200

REFERENDUM CAMPAIGN TRAINING



SANGAMON CO. SALES TAX REF. PLAN

Persuasive Communications

- How Often:
 - *Repetition, Repetition, Repetition*
 - Better to contact one household three times than three households one time
 - Target messages



Persuasive Communications

- Quality:
 - There is a lot of competition
 - High quality does not equal high cost



Planning & Informational Efforts

District Communications

- Material must be informational only
- Cannot advocate yes vote



District Communications Tools

- Mailers
- Newspaper ads
- District, school & staff newsletters
- E-newsletters
- Website
- FAQ (Frequently Asked Questions) document
- PTO & Booster Club meetings and newsletters
- Speakers bureau
- Backpack mail
- Press releases

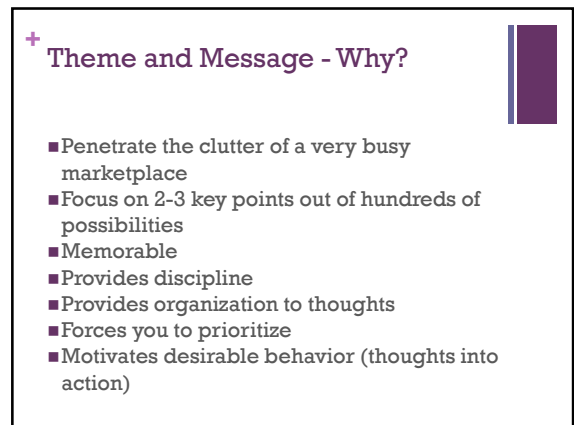


District Communications Tools

- Employee briefings
- Board meeting agenda items
- Video
- District & cable television
- Letters to the community
- Voter registration effort
- Key community leadership briefings
- Signage at schools
 - Bond issue, list of facility projects
- Election day school-based activities



REFERENDUM CAMPAIGN TRAINING



SANGAMON CO. SALES TAX REF. PLAN

+ An example:

- Our need is real
- Our solution is affordable
- Our time is now

+ And another example:

- It's Time
- It's Responsible
- It's Important

+ And yet another example:

- Restore programs now
- So our kids can compete
- And our neighborhoods stay strong

+ And a final example:

- Real needs
- An affordable plan
- Benefits for generations to come

Theme and Message

- *Classrooms for Kids*
- *Investment in Jobs*
- *Stronger Community for Families*
- *Property Tax Relief for All*

Theme and Message

- *Better Schools For Kids*
 - *Better Way of Paying For Them*
 - *Better Future for Generations to Come*
- It's a Better Way*


REFERENDUM CAMPAIGN TRAINING

+ What is Theme/Message?

- Theme/message is a **significant idea** or thought that you want your audiences to **know, understand, remember** and – if you are lucky – **repeat**
- An effective key message **leads your audience** to the **desired behavior** – action, attitude change, awareness

+ What it is not ...

- It is **not about spin**
- It is not a spin statement
- Nor is it a disguise for spin



+ Effective Theme/Messages

- Are based on your research
- Are **true**
- Are **concise and simple**
- Related in **human terms**
- Connect with people's emotions
 - Powerful,
 - Clear, and
 - Consistently Repeated

+ Developing Theme/Message

- Determine if you will craft the message and if others will help
 - Maybe we are **just a helper** in crafting the message
- What do we know and what additional information do I need to gather?
 - **Take the time** to do this right
- Is there greater context to be considered?
 - **Double-check** that your theme/message doesn't conflict with the district messages
- Identify primary and secondary audiences
 - Who needs to hear your message and who might just **benefit** from hearing your message

+ Developing Theme/Message *cont'd*

- What is the desired **outcome**?
 - Understanding, change in attitude, etc.
- **Write and rewrite**
 - Keep it simple to understand
 - Don't use acronyms and jargon
- **Practice** delivering the messages
 - They should become natural
- **Repeat** the message
 - Rule of thumb: need to hear/see a message seven times before it resonates

Communications Pieces

- Brochures
- Door hangers
- Direct mail
- Publications
- Paid media
- Yard signs & banners
- Lapel stickers & buttons
- Bumper stickers, t-shirts, etc.
- Website
- E-mails
- Video
- Automated calls



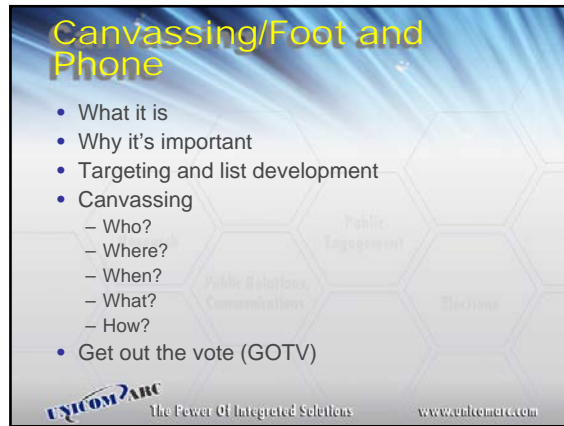
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SANGAMON CO. SALES TAX REF. PLAN



UNICOM?ARC The Power Of Integrated Solutions

Research Public
**Canvassing
Subcommittee** Elections
Public Relations
Communications Engagement



Canvassing/Foot and Phone

- What it is
- Why it's important
- Targeting and list development
- Canvassing
 - Who?
 - Where?
 - When?
 - What?
 - How?
- Get out the vote (GOTV)

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Canvassing

- What it isn't
- What it is

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Why is Canvassing Important?

If you can't count it,
it didn't happen!
And — effective communications!

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Targeting & List Development

How many votes do we need to win?

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How do we find these votes?

By building a targeted walk list

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REFERENDUM CAMPAIGN TRAINING

Walk List: Step One

- Acquiring lists
 - Registered voter list
 - Voter history
 - Parent list
 - Staff list
 - Other lists
 - Foundation
 - Alumni



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Walk List: Step Two

- Combine lists into single database
 - Flag parents, staff, etc.
 - "Household" list



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Walk List: Step Three

- Finding "yes" votes
 - Survey results
 - Voter history
 - Precinct analysis
 - Friends of the district



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Walk List: Step Three

- Avoiding "no" votes
 - Sorting by age
 - Precinct analysis
 - Personal knowledge
 - Known opponents



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Walk List: Step Four

- Sorting the list for printing
 - Precinct, attendance area
 - Street (alphabetical)
 - Odd/even
- Divide into packets
 - About 75-100 households each



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Canvassing: Who?

- Teams of two
- Recruit canvass captains at each school
- Canvassers should include:
 - Parents
 - Staff
 - Board members
 - Other community members



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Canvassing: When?

- Four Saturdays before the election meeting at a central location
- Timeline
 - 8 a.m.
 - Meet and greet
 - Check out packets
 - 8:30 a.m.
 - Rally
 - Canvass training
 - 9 a.m.
 - Canvassing teams hit streets
 - 12 p.m.
 - Teams return packets

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Canvassing: What?

- Materials for each packet
 - Plastic bag
 - Walk list
 - Map
 - Canvass instructions
 - Canvass script
 - “Count-on-me” form
 - “I-have-a-question” form
 - Brochures
 - Door hangers
 - Absentee or early voter information
 - Video

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Canvassing: How?

- Asking the magic question:
 - “Can we count on your support on Election Day?”

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Canvassing: How?

- Weekly follow-up
 - Flagging “yes” households in database
 - Responding to “I-have-a-question” forms
 - Compiling yard sign requests
 - Follow-up letters and thank you postcards

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Get Out The Vote (GOTV)

- Four-day program:
 - GOTV postcards to “yes” households
 - Reminder to vote calls
 - “Cell phone Sunday”
 - Poll workers on Election Day
 - School activities on Election Day

Getting a specific commitment to vote is critical!

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Canvassing Duties

- Build walk list
- Recruit volunteers
- Acquire detailed street maps
- Assemble packets
- Mail thank you cards and letters
- Update database with “yes” voters
- Coordinate GOTV efforts

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REFERENDUM CAMPAIGN TRAINING

Goals By District

- See handout



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Community Outreach Subcommittee

Speakers Bureau

- Recruit and train volunteers
- Identify speaking opportunities
- Create master schedule of speaking engagements
- Determine specifics
 - Room set-up, length of speech, contact person
- Assign speakers for each engagement
- Equip speakers with script for speech & materials/handouts
- Speech follow-up activities



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Endorsements/Mailers

- Develop and print Resolution of Endorsement to be adopted and signed
- Organizations
 - Membership mailers
- Publicize endorsements
 - News releases, mailers, ads
- Second party mailers
 - News releases, mailers, ads



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Community Groups

- Associations/Clubs
- Businesses
- Business Groups
- Civic Organizations
- Education Foundation(s)/Institutions
- Government Officials
 - City Council
 - Mayor
 - Legislators
- Labor/Trade Unions
- Media (Newspapers, Radios)
- Medical Community
- Pre-School & Day Care Leaders/Owners
- Professional Associations
- PTA/PTO/Booster Groups
- Realtors/Realtor Groups
- Religious Councils/Groups
- Student Groups
 - Student Council, etc.



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Letters to the Editor

- Letters and ideas provided by Communications
- Enlist team leader
- Obtain guidelines from newspapers
- ID those who will write and sign letters
- Consider using letter review team
- Determine schedule for submitting letters
- Consider having a Response Team
 - Determines method for responding to negative letters



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Yard Signs

- Provided by communications
- Enlist yard sign team leader
- Obtain locations from canvassing committee
- Distribute yard signs



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Voter Registration

- Determine registration deadline
- Determine registration locations, hours of operation
- Make sure target audience is registered
- Match voter registration and parent data base to determine list of parents who are not registered
- Work with election authority to schedule special registration events/opportunities convenient for target audience
- Target high school students and recent graduates



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Absentee/Grace Period/Early Voting

- Obtain information and forms
- Make available to target audience
 - Target those who will be out of town on election day
 - Target alumni who may be at college on election day
- Integrate into canvassing program



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Poll Greeters

- Purpose:
 - Greet voters as they arrive at polls
 - Give voters handout
 - Ask for YES vote
 - Be friendly and courteous
- Enlist team leader
- Obtain list of polling places
- Enlist a captain for each polling place



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Poll Greeters

- Create master schedule for each polling place
- One to two hour time slots
- Recruit and assign volunteers for each time slot
- Two people for each slot is recommended
- Deliver materials to first worker in waterproof container
 - Buttons
 - Name tags
 - Handouts
 - Yard signs
- Materials passed on to workers in next time slot as day progresses



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Contributions Subcommittee

REFERENDUM CAMPAIGN TRAINING

Types of Contributions

- Cash
- In kind
 - Services
 - Products



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Funding Sources

- Vendors
- Construction/finance industry
- Area businesses
- Individuals
- Staff



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Important Suggestions

- Make it an early priority
 - EMILY
- Have a plan
- Develop lists and targets
- Meet for accountability
- Ask
- Ask for a specific amount
- Expect to hear “no” more often than “yes”



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Important Suggestions

- People who can raise money are those who give money
- Train the committee
- Don't practice at the top
- Collect sample letters and scripts
- “Send a Frenchman to speak to the French”
- Avoid conflicts of interest
- Contributions relating to turnout



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Campaign Finance

- Treasurer
- Register as a legal committee
- Reporting guidelines
- Report in kind
- Online help
- Legal help



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Final Thoughts

- Remember:
 - Have fun
 - Take pride in what you are doing
 - This is work, but you're doing it to better the education your children receive and the quality of life in your community
 - Focus on what is important



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SANGAMON CO. SALES TAX REF. PLAN



s u p p l e m e n t a l i n f o r m a t i o n

INTRO TO COUNTY SCHOOL FACILITY TAX

County School Facilities Sales Tax Informational Video



1



County School Facilities Sales Tax: Seminar for District Officials and Board Members

STIFEL
NICOLAUS



Presenters

- Anne Noble, Stifel Nicolaus
- Jim Burgett, Stifel Nicolaus
- Tom Crabtree, Stifel Nicolaus
- Rod Wright, UNICOM-ARC
- Andrew Duttlinger, UNICOM-ARC
- Todd Cyrulik, BLDD Architects
- Sam Johnson, BLDD Architects

3

Agenda

- 9:30-10:30 Introduction to the CSFT**
 - An innovative approach to funding
 - CSFT in Illinois: past results and future votes
- 10:30-11:00 Building the foundation for a referendum**
 - Public opinion research
 - Community engagement
- 11:00-11:15 Break**
- 11:15-12:00 Conducting a successful referendum effort**
 - Informational and "vote yes" communication strategies
 - Case studies: Macon and Logan Counties
- 12:00-12:30 Discussion**

4

Introduction to the County School Facility Sales Tax

Anne Noble
Jim Burgett
Tom Crabtree
Stifel Nicolaus

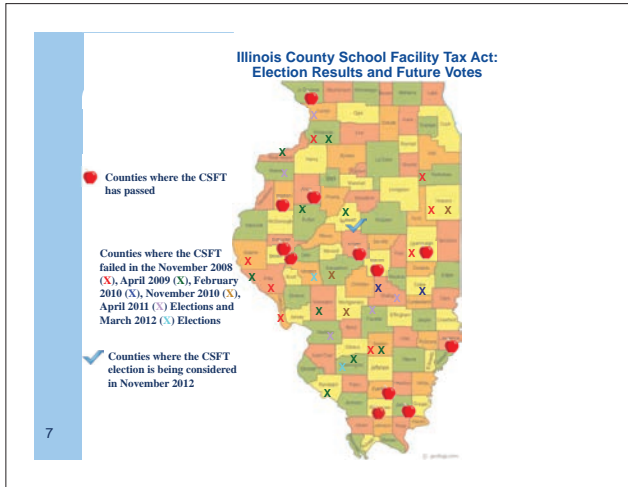
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Nontraditional Approach for Illinois Public Schools

- Sales tax vs. Real Estate tax for school capital
 - Allows county voters to approve a sales tax to fund school facility costs
 - **1% maximum** in ¼% increments
- Law went into effect October 2007
- Law was based on similar law that is currently in place in every county in Iowa
- Law was amended in August 2011
 - County Board no longer has to approve the tax

6

INTRO TO COUNTY SCHOOL FACILITY TAX



Low Impact on Key Business and Fixed Income Persons

Sales Tax Base:

- Everything in the municipal and county sales tax base is included in the tax base **except for:**
 - Cars, Trucks, ATVs
 - Boats & RVs
 - Mobile homes
 - Unprepared Food
 - Drugs (including over-the-counter and vitamins)
 - Farm Equipment and Parts
 - Farm Inputs
- "If it is not currently taxed, it will not be taxed"

How to Use Sales Taxes

- Pay as you go** capital projects
 - Sales tax can be saved up over time
- Issue new bonds** for current capital needs
 - Support bonds with sales tax
- Retire existing debt** issued for capital purposes
 - Abate taxes
 - Refund qualifying debt
-Or any combination of the above

Interest on money received on a monthly basis and reserved for bond payments or future construction projects may be transferred to the General Fund... Education & Operation and Maintenance Fund

Benefit to Property Taxes

Two Ways to Decrease Property Taxes

- Reduce:** A district can abate or decrease existing property taxes by using sales tax funds to pay off outstanding building bonds.
 - Property taxes reduced on residential, commercial and industrial properties
- Avoidance:** A district can avoid levying property taxes by using sales tax funds to pay for facility projects that would have been paid for with property taxes

Use of Sales Tax Revenues

Uses of Sales Tax	Ineligible Uses
<ul style="list-style-type: none"> New Facilities Additions & Renovations Land Acquisition Ongoing Maintenance Architectural Planning Durable Equipment (non-moveable items) Fire Prevention and Life Safety Disabled Access & Security Energy Efficiency Parking Lots Demolition Roof Repairs 	<ul style="list-style-type: none"> Direct Instructional Costs Text Books Buses Detached Furniture & Fixtures Computers Moveable Equipment Operating Costs Salaries and Overhead

Abatement of Property Taxes Levied to Pay Bonds Issued for Capital Purposes

County School Facility Tax Worksheet for Meador County Schools Debt Capacity and Abatement Impact Per District

DRAFT

1	2	3	4	5	6	7	8	9	10	11	12	13
County	2010 District's Total RAV (1)	% of RAV (2)	2011-12 Estimated County Revenue (3)	Percent of RAV (4)	Adjusted Annual CSFT per District (5)	Estimated Annual CSFT per District @ 1% (6)	Estimated Annual CSFT per District @ 2% (7)	Estimated Annual CSFT per District @ 3% (8)	Estimated Annual CSFT per District @ 4% (9)	Estimated Annual CSFT per District @ 5% (10)	Estimated Annual CSFT per District @ 6% (11)	Estimated Annual CSFT per District @ 7% (12)
Meador	1,200,000	100%	250,000	21%	1,200,000	120,000	240,000	360,000	480,000	600,000	720,000	840,000
Lincoln	1,500,000	100%	300,000	20%	1,500,000	150,000	300,000	450,000	600,000	750,000	900,000	
Clatsop	1,000,000	100%	200,000	20%	1,000,000	100,000	200,000	300,000	400,000	500,000	600,000	
Wheeler	800,000	100%	160,000	20%	800,000	80,000	160,000	240,000	320,000	400,000	480,000	
Total	4,500,000	100%	910,000	20%	4,500,000	450,000	900,000	1,350,000	1,800,000	2,250,000	2,700,000	3,150,000

Value of a Student: \$11,000

Prepared by: Stifel Nicolaus & Company, Inc. For additional information please contact Tom Crutcher at 1-800-234-2111 ext. 8457 April 19, 2012

(1) As reported by IDEC Annual Financial Reports and County
 (2) Based on County Public Safety Statistics as reported by IDEC Fall Reporting Report "Measures" then adjusted by factor of % of RAV to the County
 (3) Based on County Public Safety Statistics from CSFT 0% to 7% from the State tax
 (4) Assumed 1% annual growth in sales tax

Jan-Dec	CIPs at 1%	CSFT at 1% less 2% Fee	% Change
2006	\$2,000,000	\$2,000,000	0.0%
2007	\$2,175,000	\$2,175,000	8.8%
2008	\$2,350,000	\$2,350,000	8.0%
2009	\$2,525,000	\$2,525,000	7.4%
2010	\$2,700,000	\$2,700,000	6.8%
2011	\$2,875,000	\$2,875,000	6.3%

The Money Follows the Student

STIFEL NICOLAUS

INTRO TO COUNTY SCHOOL FACILITY TAX

supplemental information

County School Facility Tax
Worksheet for Peoria County Schools
Debt Capacity and Abatement Impact Per District

DRAFT

1	2	3	4	5	6	7	8	9	10	11	12	13	14
County	Peoria	2010 District Total EA's 16	% of EA's in County	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved
County	Peoria	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%
District	Peoria	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%

(1) As reported by BLD's Annual Financial Reports and County
(2) Based on 2010 assessed values as reported by BLD's 2010 Working Report then adjusted by factor of 0.97 EA's in County
(3) Based on 2011 EA's as reported by BLD's Department of Revenue (2011) for Peoria County
(4) Based on 2011 assessed values in use
(5) Based on 2011 assessed values in use

Jan-Dec	CFPS at 0.5%	CFPS at 0.5% after 2009	CFPS at 0.5% after 2011	% Change
2008	118,822,000	118,822,000	118,822,000	0.0%
2009	118,822,000	118,822,000	118,822,000	0.0%
2010	118,822,000	118,822,000	118,822,000	0.0%
2011	118,822,000	118,822,000	118,822,000	0.0%
2012	118,822,000	118,822,000	118,822,000	0.0%
2013	118,822,000	118,822,000	118,822,000	0.0%
2014	118,822,000	118,822,000	118,822,000	0.0%
2015	118,822,000	118,822,000	118,822,000	0.0%

The Money Follows the Student

STIFEL NICCOLAIS

13

County School Facility Tax
Worksheet for Linn County Schools
Debt Capacity and Abatement Impact Per District

DRAFT

1	2	3	4	5	6	7	8	9	10	11	12	13	14
County	Linn	2010 District Total EA's 16	% of EA's in County	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved	2011 Board Approved
County	Linn	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%
District	Linn	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%	107,302,000	100%

(1) As reported by BLD's Annual Financial Reports and County
(2) Based on 2010 assessed values as reported by BLD's 2010 Working Report then adjusted by factor of 0.97 EA's in County
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Jan-Dec	CFPS at 0.5%	CFPS at 0.5% after 2009	CFPS at 0.5% after 2011	% Change
2008	118,822,000	118,822,000	118,822,000	0.0%
2009	118,822,000	118,822,000	118,822,000	0.0%
2010	118,822,000	118,822,000	118,822,000	0.0%
2011	118,822,000	118,822,000	118,822,000	0.0%
2012	118,822,000	118,822,000	118,822,000	0.0%
2013	118,822,000	118,822,000	118,822,000	0.0%
2014	118,822,000	118,822,000	118,822,000	0.0%
2015	118,822,000	118,822,000	118,822,000	0.0%

The Money Follows the Student

STIFEL NICCOLAIS

14

How to Place Before Voters?

- School boards pass a resolution
- When School Boards representing more than 50% of the resident student enrollment in the county adopt resolutions, the Regional Superintendent **must** certify the question to the County clerk
- County Clerk will place on the ballot at the next regularly scheduled election

15

Passing the Vote and Receipt of Revenues

- Simple majority of votes cast needed to pass
- After approval by the voters, the tax will be imposed
- The ordinance and the election results must
 - Be certified by the County Clerk
 - Filed with the Illinois Department of Revenue
- Money is received monthly beginning approximately four months after the tax goes into effect
- The money follows the student

16

Timeline is Critical

Election Date	Nov. 6, 2012	Feb. 26, 2013*	April 9, 2013	No Election Nov. 2013
Pass Resolution (School Districts)	Aug. 20, 2012	Dec. 10, 2012	Jan. 22, 2013	
Certify the Resolution (County Clerk)	No later than Aug. 29, 2012	No later than Dec. 20, 2012	No later than Jan. 31, 2013	
Election	Nov. 6, 2012	Feb. 26, 2013	Apr. 9, 2013	
File with H. Dept. of Rev. to Issue Tax	No later than April 1, 2013	No later than April 1, 2013	No later than Oct. 1, 2013	
Sales Tax Goes into Effect	July 1, 2013	July 1, 2013	Jan. 1, 2014	
Regional Superintendent Receive Funds from State	Approximately 90 Days after July 1, 2013	Approximately 90 Days after July 1, 2013	Approximately 90 Days after Jan. 1, 2014	
District Receives New Sales Tax Revenues	October 2013	October 2013	April 2014	

*To use February Primary Election, a political election may also be required to allow CSFST on the ballot

17

Building the Foundation for a Referendum

Rod Wright
UNICOM-ARC

18

INTRO TO COUNTY SCHOOL FACILITY TAX

County Sales Tax Referendum

Like (but unlike) a District Referendum



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It's Like a District Referendum...

- Foundation built by community engagement
- Top-down campaign committee
- Community leadership
- Unity
- "Doers" not thinkers
- Written campaign plan, based on research
- Successful fundraising



20

It's Unlike a District Referendum...

Organization, strategy are more complicated

- Politics more involved
- Coordinating multiple districts a challenge
- Efforts to affect turnout might be necessary in some areas



21

It's Unlike a District Referendum...

Different communications challenges

- Unfamiliar type of school funding
- Need to keep referendum from being identified with a single district
- Targeting of messages more important



22

It's Unlike a District Referendum...

Opposition more likely

- Sales tax referenda often attract organized opposition
- County/cities/districts might oppose referendum

Fundraising more challenging

- Especially if revenue to be used only for property tax relief



23

Key Questions for Success

Do we have a fighting chance?

Do we have a bulletproof plan?

Do we have internal unity?

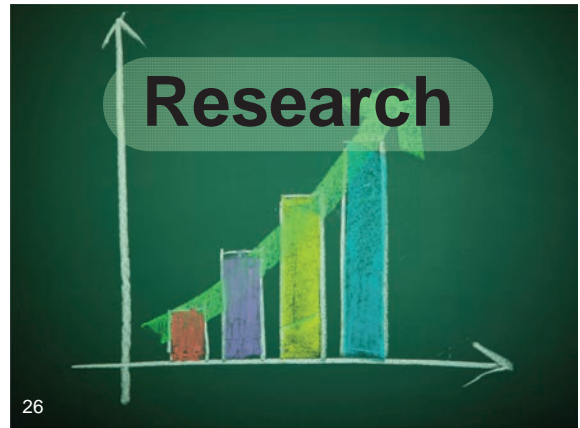
Can we conduct an effective campaign?

24

How to Get “Yes” Answers

- Public opinion research
- Community engagement
- Effective referendum communications
 - Including a “vote yes” campaign effort

25



Public Opinion Research: Why?

- Talk is cheap, nothing else is.
- Intuition is often wrong.
- People who attend meetings, make calls, etc. are usually not representative of the voting public.
- Language matters.

27

Public Opinion Research

Language matters!

- We have gone five years since the District had a tax increase. Unless this proposal passes, we will sacrifice all the recent progress that has been made in our schools.
(45.0% agree)
- In April 2000, we were told that the tax increase would last five years and that funds would be used to improve our schools. Both things have happened. We need to continue improving our schools and our community by supporting these proposals.
(67.8% agree)

28

Solid Research: How?

- Define audiences
- Brainstorm with team members
- Choose most appropriate methodology

Decatur Public Schools

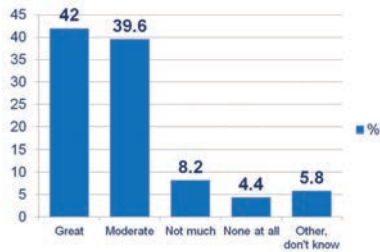
Public Opinion Research

- February, 2010
- Telephone survey
- 500 completed interviews
 - Registered voter households
- Margin of error: $\pm 4.4\%$

30

INTRO TO COUNTY SCHOOL FACILITY TAX

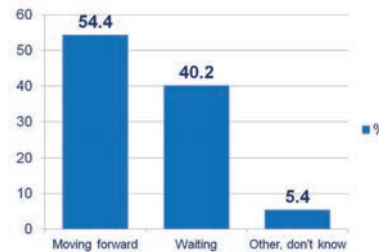
Need for Improving Facilities?



Decision4Decatur, a community engagement group, is asking for community input on improving high school facilities...how much need do you think there is for improving high school facilities in Decatur?

31

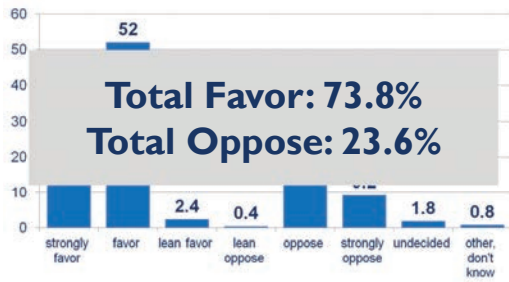
Make improvements now?



Would you prefer moving forward with improvements at the current time or waiting a few more years to discuss this?

32

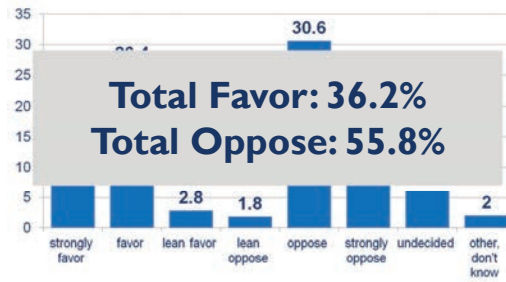
Make Improvements to High School?



Do you favor or oppose Decatur schools moving forward with some type of ballot proposal to improve the high schools?

33

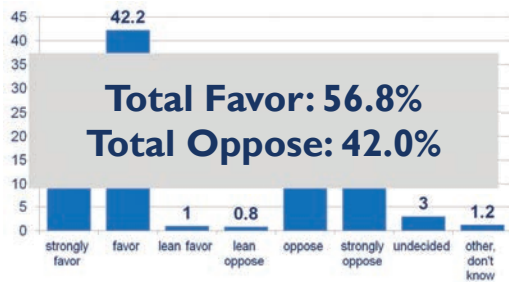
Fund Improvements with Bond Issue?



Let's assume Decatur Public Schools placed on the ballot a \$100 million bond proposal to improve high school facilities. Would you...?

34

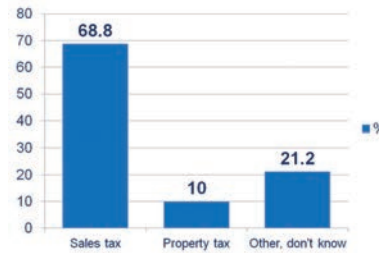
Fund Improvements with Sales Tax?



Illinois law allows counties to pass a one-percent sales tax to support improving school facilities. If that proposal is placed on the ballot...

35

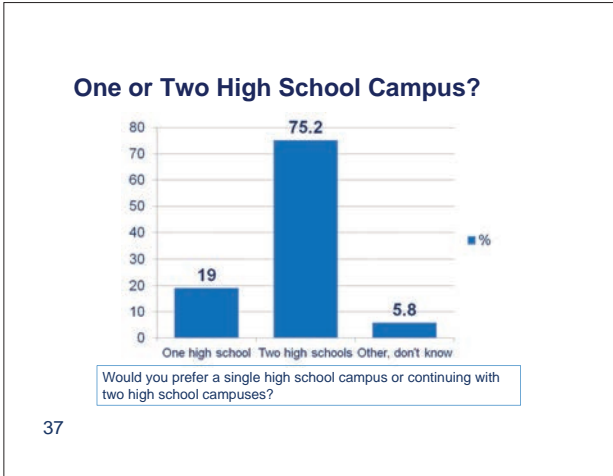
Sales or Property Tax Increase?



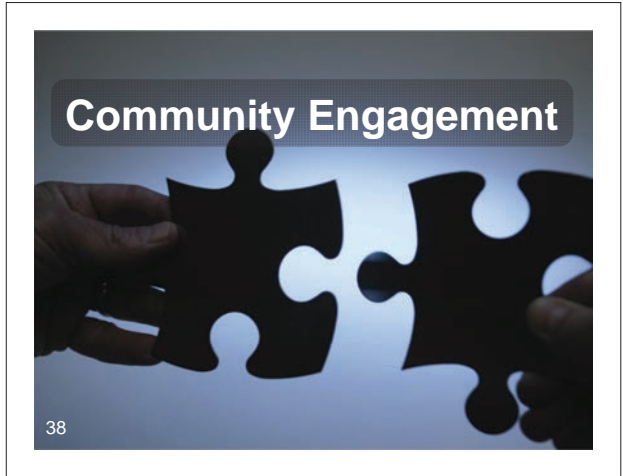
Would you prefer funding improvements with a sales tax increase or a property tax increase?

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INTRO TO COUNTY SCHOOL FACILITY TAX



37



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- ### Community Engagement Works
- Why?
 - Public permission is needed for meaningful change
 - Public won't support what it doesn't understand
 - Public is resistant to top-down approach
 - Discovery is more powerful than persuasion
 - It is a powerful communication tool
 - Builds an army for implementation

39

- ### Community Engagement: Best Practices
- Involves a large number of people
 - Meaningful dialogue resulting in consensus
 - Ongoing two-way communication

40

- ### Community Engagement: Best Practices
- Well planned/organized meetings/events
 - workshops
 - open houses
 - Small group work sessions and one-on-one activities
 - Documentation (information and consensus points)

41

- ### Community Engagement: Best Practices
- Effective Two-Way Communications (upfront and continuous)
 - Personal Letters
 - Brochures
 - Press Releases (media relations)
 - Mailings
 - Website/E-Mail
 - Video

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INTRO TO COUNTY SCHOOL FACILITY TAX

Community Engagement Sample Names & Logos



43

Community Engagement: communications

- Brochures
- Flyers/posters
- Letters of invitation
- Meeting reminders
- Newsletters
- Social media
- Website
- Video
- News media

See handout
for samples

44

Video Sample 1



45

Video Sample 2



46

Community Engagement: Case Study

Decatur School District 61

- 22nd largest Unit District in Illinois
- 11,000+ students, Pre-K — Grade 12
- 22 Student Centers
- Technical Academy

Goal: Improve 1957 Vintage High School Facilities

47

Community Engagement: Case Study

Macon County Public Schools

- Located in the heart of Illinois
- 100,000 Residents
- Decatur — largest city in Macon County
- 12 School Districts (Including Decatur 61)
- 20,000 Students

Goal: Funding for High School Renovation or Replacement

48

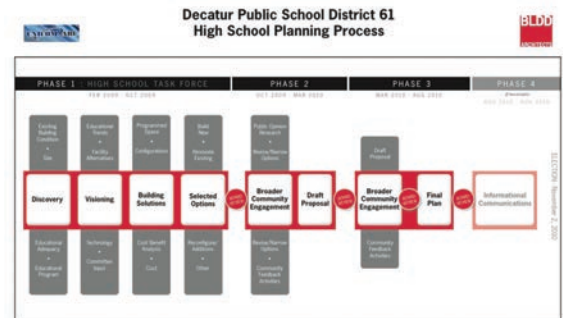
INTRO TO COUNTY SCHOOL FACILITY TAX

Community Engagement: Decatur Public Schools

Project Timeline:
(February 2009 – November 2010)

- Phase I: High School Task Force (Feb-Oct 09)
- Phase II: Community Engagement (Oct-Mar 10)
- Phase III: Community Engagement (Mar-Aug 10)
- Phase IV: Information and Advocacy Campaign (Aug-Nov 10)

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Community Engagement Model 1

(Used In High School Task Force Phase)



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Community Engagement: Decatur Public Schools

Phase I: High School Task Force (HSTF) [Feb. '09 – Oct. '09]

- Selection of community leadership/FTM
- Monthly meetings led by U-A and architects
- Discovering (needs assessment)
- Visioning (high schools of the future)
- Exploring (examining possible solutions)
- Creating (developed 4 possible options)
- Develop BOE report of HSTF Key Findings
- Describe/Recommend next phase

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Decatur Public Schools

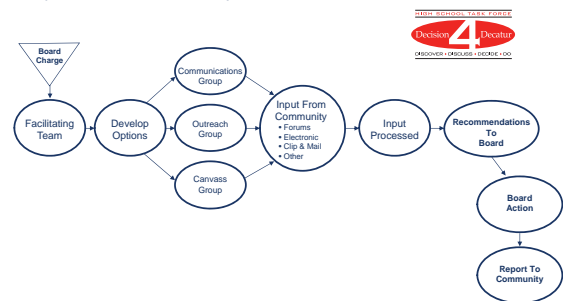
Phase I: High School Task Force



53

Community Engagement Model 2

(Used in Phases II and III)



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INTRO TO COUNTY SCHOOL FACILITY TAX

Community Engagement: Decatur Public Schools

- Phase II: Community Engagement [Oct. '09 – Mar. '10]**
- Planned/Implemented by Facilitating Team
 - Goal:
 - Communicate HSTF Key Findings
 - Describe 4 Options/Receive Community Feedback/Narrow Options to 2

55

Community Engagement: Decatur Public Schools

- Phase III: Community Engagement [Mar. '10 – Aug. '10]**
- Goal:
 - Communicate results of CE Phase II
 - Refine 2 Options – Determined Preferred Option
 - Determine Community Feedback Regarding 2 Options
 - Determine Preferred Funding Approach
 - Citizens Advisory Community (CAC) — Finance/Funding
 - Public Opinion Research
 - Canvassing
 - FT Report to Board of Education

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Community Engagement communications: Decatur Public Schools

- Brochures
- Flyers/posters
- Handouts
- Postcards
- Feedback forms

See handout for samples

57

Sample Video



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Countywide community engagement



Community Engagement: Key Outcomes

- Internal/External unity (Board/Staff/Parents/Community)
- Bulletproof plan (what and how)
- Committed volunteers
- Public permission for meaningful change

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INTRO TO COUNTY SCHOOL FACILITY TAX

Break
10:30-10:45

STIFEL
NICOLAUS




61

Conducting
a Successful
Referendum

Rod Wright
Andrew Duttlinger
UNICOM-ARC

Todd Cyrulik
Sam Johnson
BLDD Architects

62

Referendum communication

 Information
(school district)

 Vote Yes
(PAC)

63

Informational Communications

- Informational effort conducted by districts
- Cannot advocate “yes” vote

64

Informational Communication

How revenue will be used

↓

How plan was developed

↓

Impact on schools/community

↓

Election information

65

District Communications Tools

- Mailers
- Newspaper ads
- District, school & staff newsletters
- E-newsletters
- Website
- Social media
- FAQ (Frequently Asked Questions) document
- PTO & Booster Club meetings and newsletters
- Speakers bureau
- Backpack mail
- Press releases

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INTRO TO COUNTY SCHOOL FACILITY TAX

District Communications Tools

- Employee briefings
- Board meeting agenda items
- Video
- District & cable television
- Letters to the community
- Voter registration effort
- Key community leadership briefings
- Signage at schools
 - Facilities improvements to be funded by referendum
- Election day school-based activities

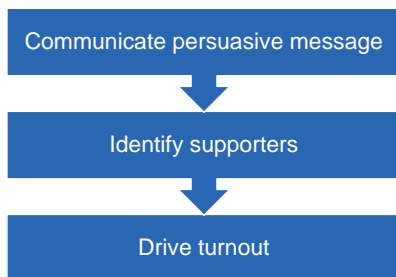
67

Steps to a successful “vote yes” campaign



68

Your job is to...



69

Your job is NOT...

- To convince everyone to vote YES.
- To educate the community about educational issues
- To defend the Board of Education or administration
- To become embroiled in Board elections or other political issues
- To go to war with possible opposition

70

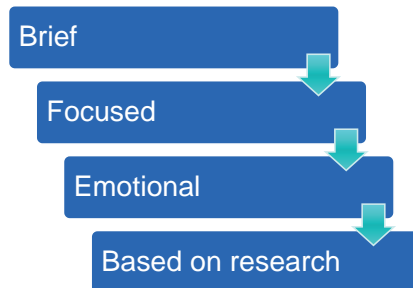
Persuasive Communications

What?

- The message
- Emotion works
- “Education” usually does not work
- Focus, focus, focus

71

Theme and Message



72

INTRO TO COUNTY SCHOOL FACILITY TAX

Theme and Message

Restore our programs now,
So our kids can compete
And our neighborhoods stay strong.

73

Theme and Message

It's time.
It's responsible.
It's important.

74

Theme and Message

The need is real.
The opportunity is now.
The benefits are forever.

75

Persuasive Communications

Who?

- Parents
- Teachers
- Community members
- *Not Board or administration*

76

Persuasive Communications

How (often)?

- *Repetition, Repetition, Repetition*
- Better to contact one household three times than three households one time
- Targeted messages

77

Persuasive Communications

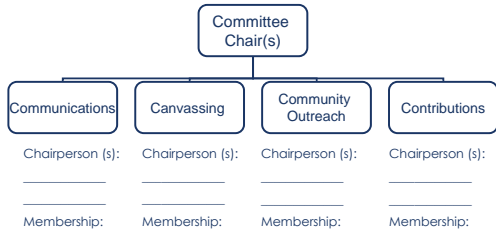
Quality is important!

- There is a lot of competition.
- High quality does not equal high cost.

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INTRO TO COUNTY SCHOOL FACILITY TAX

Committee Organizational Structure



79

Campaign Subcommittees

- Pick strong leaders
- Reach consensus on campaign plan
- Assign every campaign activity to a subcommittee

80

Referendum Communications

- Informational brochures
- "Vote yes" brochures
- Postcards
- Website
- Social media

See handout
for samples

81

Video Sample 1

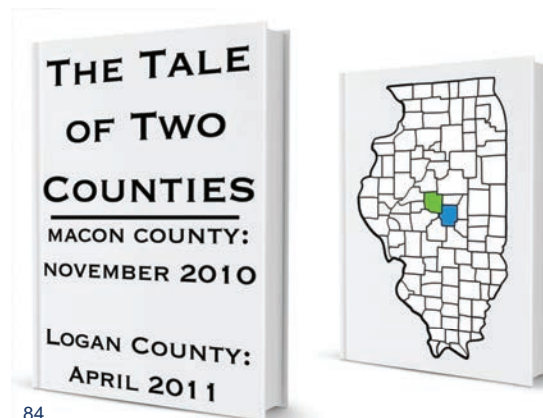


82

Video Sample 2



83



84

INTRO TO COUNTY SCHOOL FACILITY TAX

Macon County

- County-wide effort
- Some Identified Projects
- 1 ½ Year Community Engagement Process
- Targeted Canvassing
- Mostly Community Lead
- Short Final Campaign
- Supported by all but one School Board
- Major opposition/politically charge

85

Logan County

- County-wide effort
- No Identified Projects
- No Community Engagement Process
- Targeted Canvassing
- Mostly District Lead
- Short Final Campaign
- Supported 6 of 9 districts 1 remained neutral
- Minor opposition

86

Organizing the “vote yes” efforts

87

88

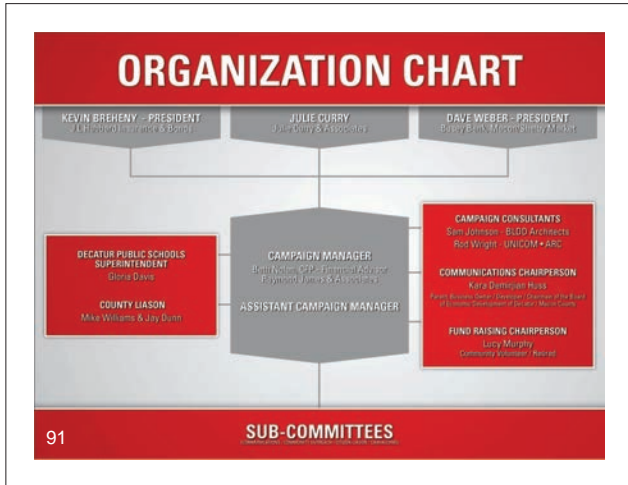
SO YOU NEED A CAT HERDER DO YA?

89

If you won't lead, please don't shoot us!

90

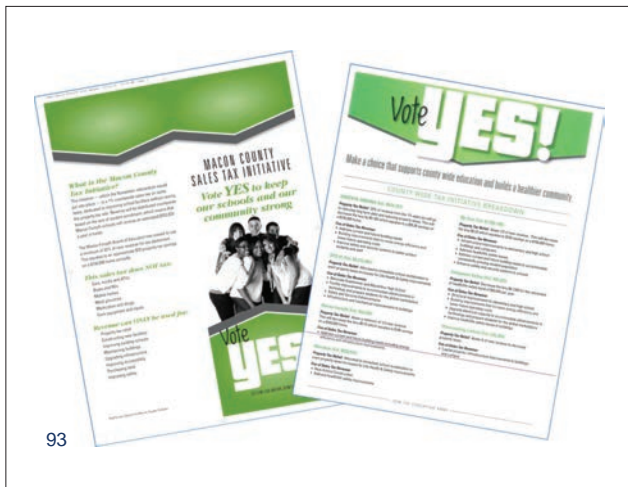
INTRO TO COUNTY SCHOOL FACILITY TAX



Theme and Message: Macon County

- Classrooms for kids
- Jobs for us
- Stronger communities for our kids and families
- Property tax relief for all

92



Theme and Message: Logan County

- Better schools
- Lower property taxes
- More jobs
- Stronger communities

94

Logan County An architect, a farmer, and teacher walk into a school.....

95

one cent MAKES SENSE FOR LOGAN COUNTY

- Here are the facts for Logan County -

FACT 1: Revenue can **ONLY** be used for lowering property taxes for existing construction bonds or maintenance or school construction projects.

FACT 2: This does **NOT** tax groceries, medication and drugs, cars, trucks, ATV's, boats & RV's, farm equipment and parts.

FACT 3: Most districts have pledged to use some of the funds to lower property taxes. Others will use funds for mandatory repairs without raising your taxes. LCHS has pledged to use all funds received to lower taxes.

FACT 4: All the school districts in Logan County face real, ongoing building maintenance needs; with state funding unstable and federal funds limited, money from property taxes is the only way to meet those needs.

FACT 5: Revenue follows the student enrollments. This benefits all students who live in Logan County. Over \$1.8 Million will be divided between all Logan County Schools as shown to the left.

School District	Revenue
Hartsburg-Emden	\$189,487.00
Mount Pleasant	\$245,791.00
Lincoln Elementary	\$592,200.00
Chester-East Lincoln	\$197,507.00
New Holland-Middleton	\$ 42,026.00
West Lincoln-Broadwell	\$ 69,677.00
Lincoln High School	\$408,039.00
Little Central	\$ 31,432.00
Warrensburg-Latham	\$ 35,242.00
Olympia	\$141,109.00

203 Tenth Street Lincoln, IL 62656
 Endorsed by: Lincoln/Logan County Chamber of Commerce
Vote YES! on apr. 5, 2011

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INTRO TO COUNTY SCHOOL FACILITY TAX

Yard signs breed and mutate; they must be strategic!

97

Engaging the media, telling the story

98

He said WHAT on the radio!?!

99

I'm not familiar with that issue

100

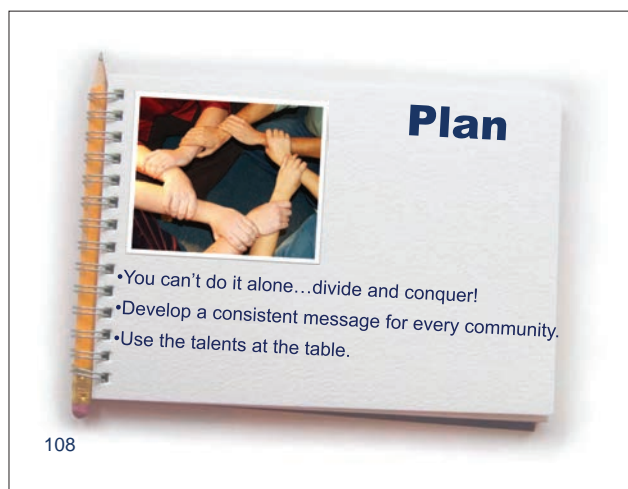
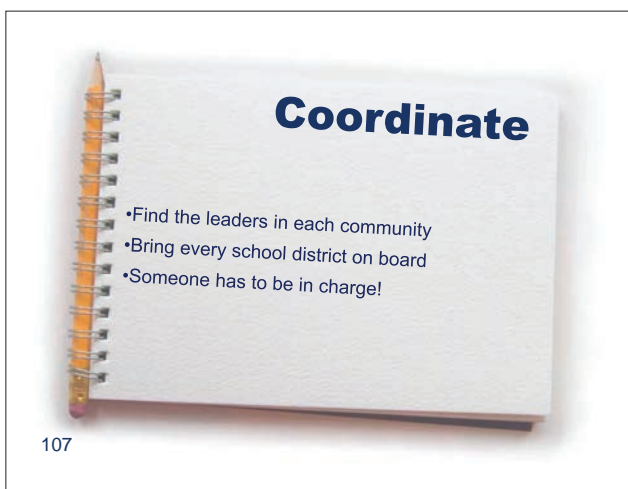
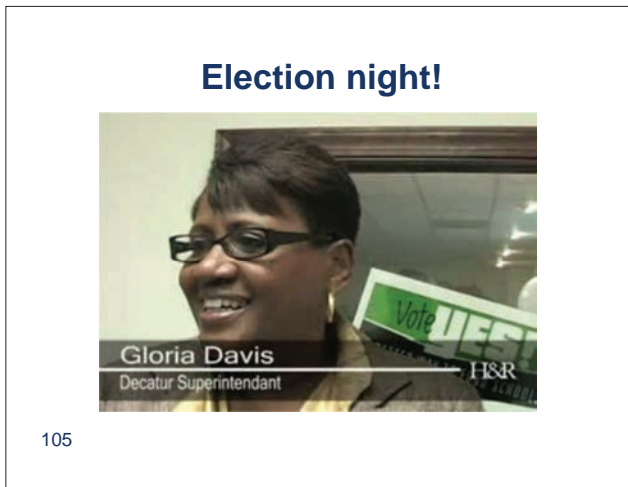
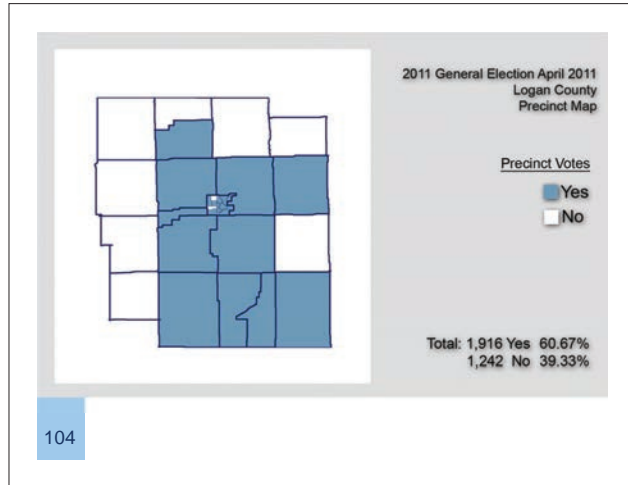
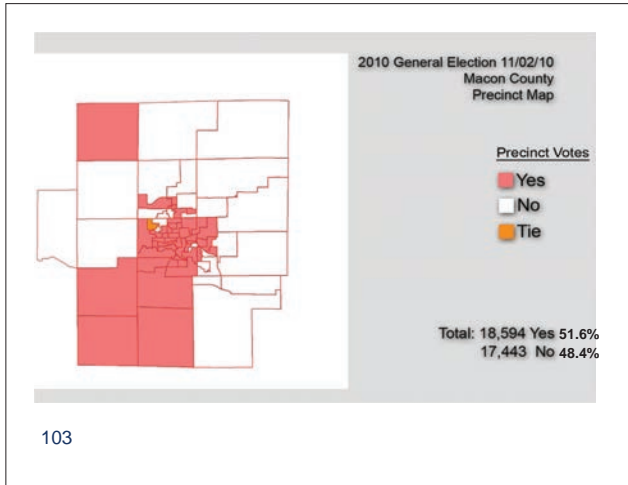
Identifying supporters, driving turnout

101

That's sort of what they are doing in Lincoln

102

INTRO TO COUNTY SCHOOL FACILITY TAX



INTRO TO COUNTY SCHOOL FACILITY TAX

Execute

- Communicate your message repetitively
- Use resources wisely
- Stay on message!

109

Integrated approach = success

- Real community engagement
- Solid public opinion research
- Strong referendum campaign

110

Discussion

STIFEL
NICOLAUS

UNICOM-ARC

BLDD
ARCHITECTS

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