

Portola Valley School District

Conversation Guide

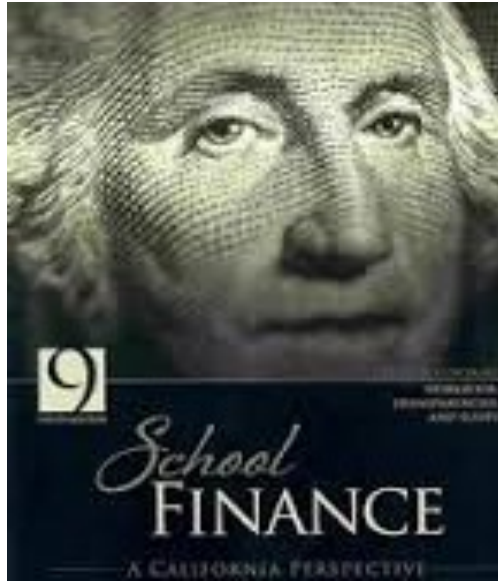
Preparing for 2018 School Bond Success

August 16, 2017

CliffordMoss.

Meeting Objectives

1. Strategic Orientation to the **Process**
2. Overview / Context for Planning
3. Key Drivers of the Process
4. Next Steps / On the Horizon...
5. Board Discussion / Q&A (throughout)



Navigating in the Public Arena

- ▶ MORE Accessible and Widely Interpreted (*because information is abundant/instant*).
- ▶ MORE Complex and Organic– at ALL Levels.
- ▶ MORE Demanding of School Leaders in Virtually Every Way.

Planning Model



A winning strategy
employs both
Art & Science.



1. Your community is unique.
2. Listening is a lost art.
3. People support what they help create.

**Time is your most
valuable resource!**

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2018 Election Options

May/June 2018						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	VOTER CONTACT	1	2	3	4	5 Walk Day / Yard Signs GO UP!
6	Absentee Ballots Mail VOTER CONTACT	7	8	9	10	11 Walk Day
13	VOTER CONTACT	14	15	16	17	18 Walk Day
20	Last day to Register to vote VOTER CONTACT	21	22	23	24	25 Walk Day
27	TARGETED G.O.T.V.	28	29	30	31	1 G.O.T.V.
3 G.O.T.V.	4 G.O.T.V.	5 ELECTION DAY! GOTV to WIN!				

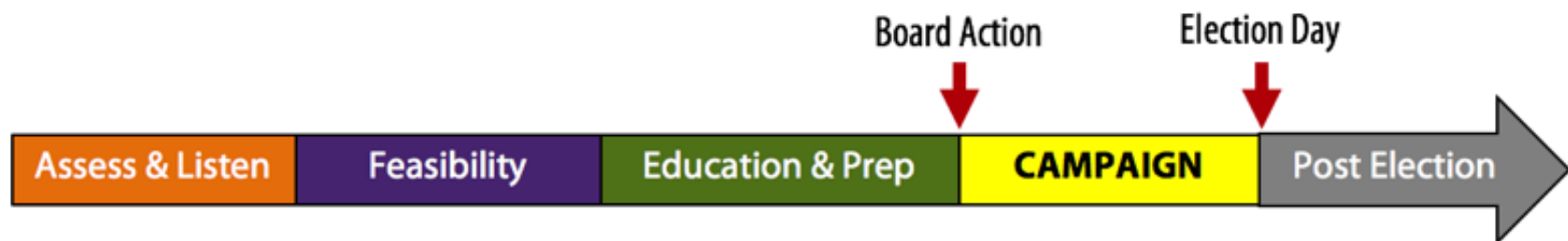
Key Dates - 2018:

JUNE Election

- Filing Deadline: Mar 9, 2018
- Election Day: Jun 5, 2018

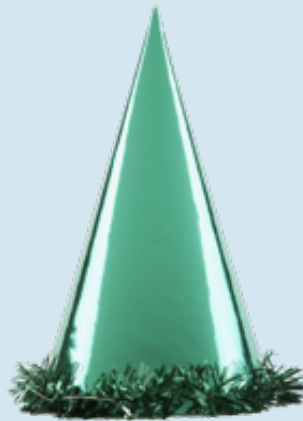
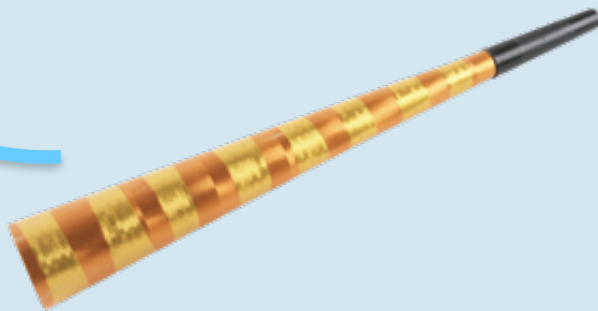
NOVEMBER Election

- Filing Deadline: Aug 10, 2018
- Election Day: Nov 6, 2018



Election Day 2018

- *We asked voters to support us...And They DID!*
- *We WON because of everyone's Dedication & hard work!*



Key To Our Success:

**The more we
make it about
NEED...**

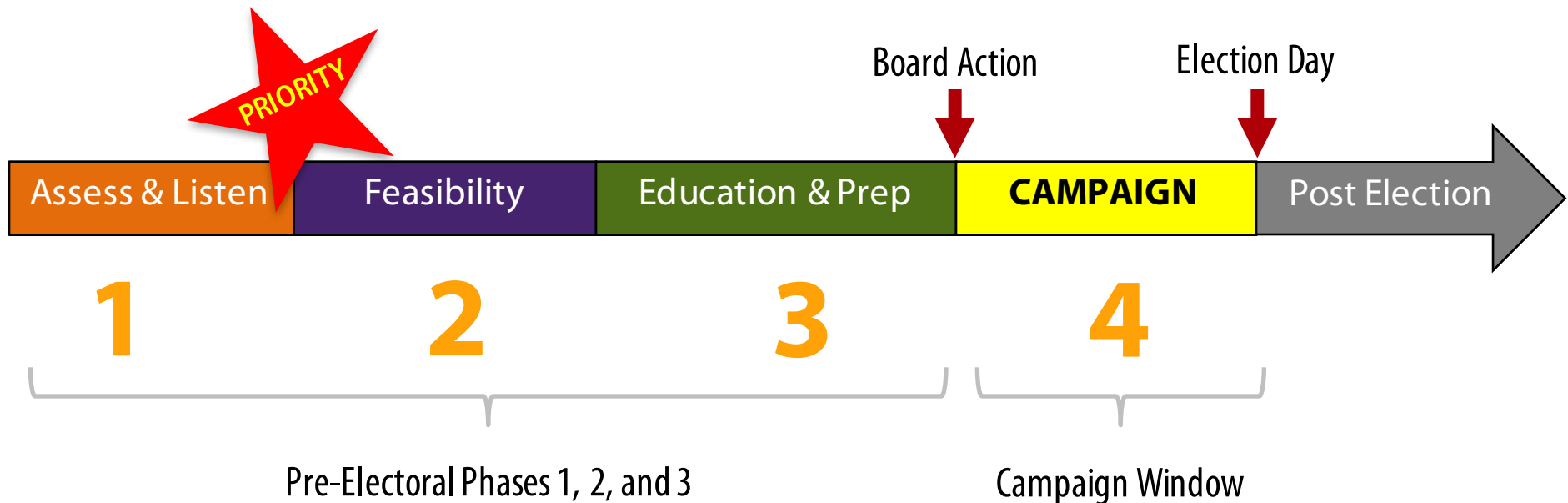


**...The more we
make it about the
MONEY...**



Early Listening is Key!

Step 1. Assess & Listen



June 2018 Timeline

- **Aug – Oct 2017**
Listening/Engagement – Round 1
Stakeholders / Opinion Leaders / Voters / Public Info
 - **Sept – Oct 2017**
Conduct public opinion poll.
Evaluate early 2017 Listening work
 - **Nov – Jan 2018**
Listening/Engagement – Round 2
Stakeholders / Opinion Leaders / Public Info
Ballot Measure Prep / Bond Plan Shared Broadly
 - **Early February 2018**
Board Workshop – Ballot Package Review
 - **Late February 2018**
Board Action – Calling for an Election
 - **March 9, 2018**
Filing Deadline for June 2018 Election
-

CAMPAIGN WINDOW

- Mar/Apr/May/June 5th
Campaign Window
- **June 5, 2018**
ELECTION DAY!

Approach

Track 1

District Due Diligence

Facilities, Technology, Finance, Legal, Logistics etc...

Track 2

BOARD Engagement & Education

NEED, Process, Info/Data/Research, Consensus, etc...

Track 3

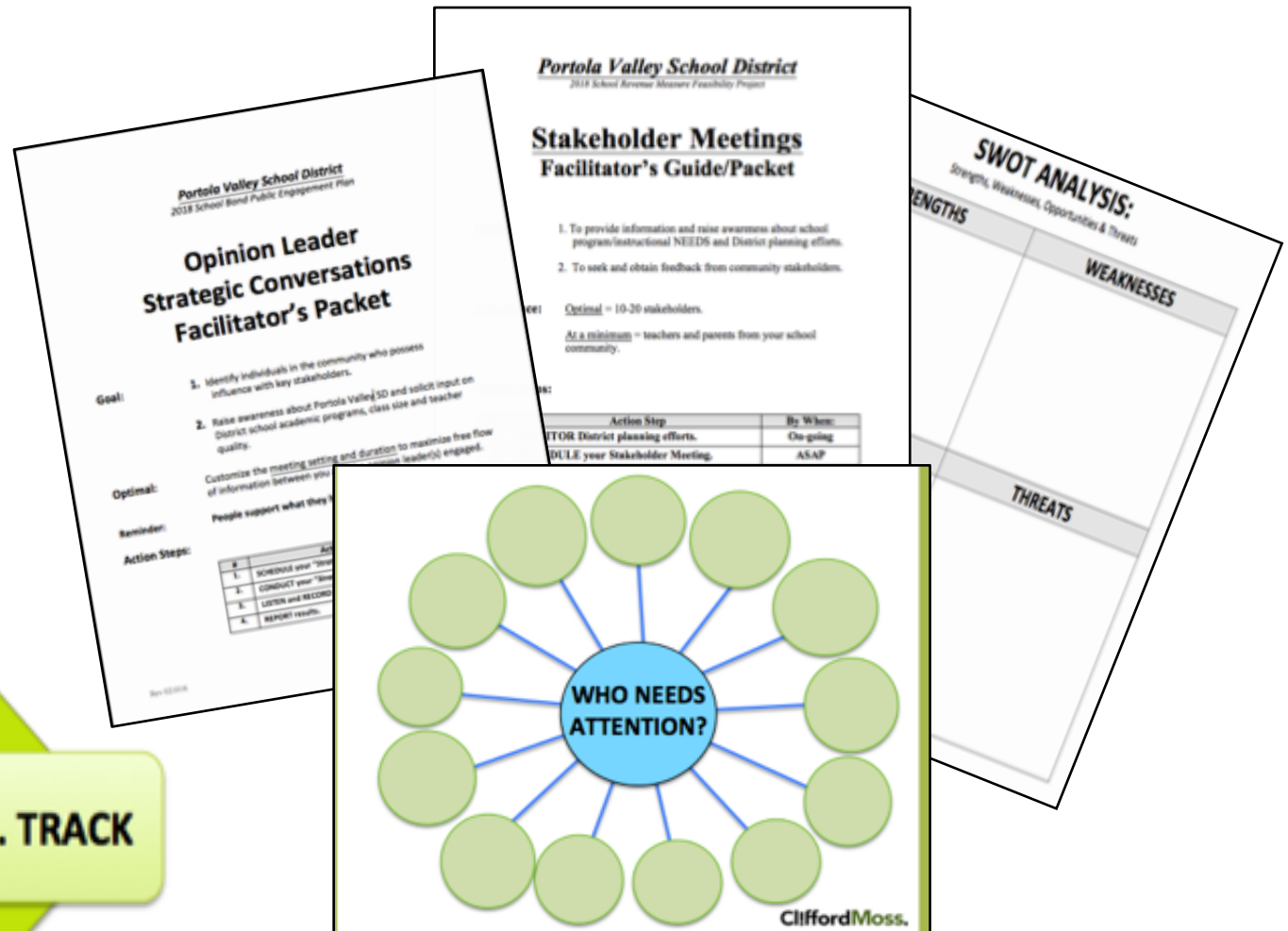
Stakeholder & Opinion Leader Engagement

"People Support What They Help Create."



What Listening Looks Like

**People support
what they help create.**



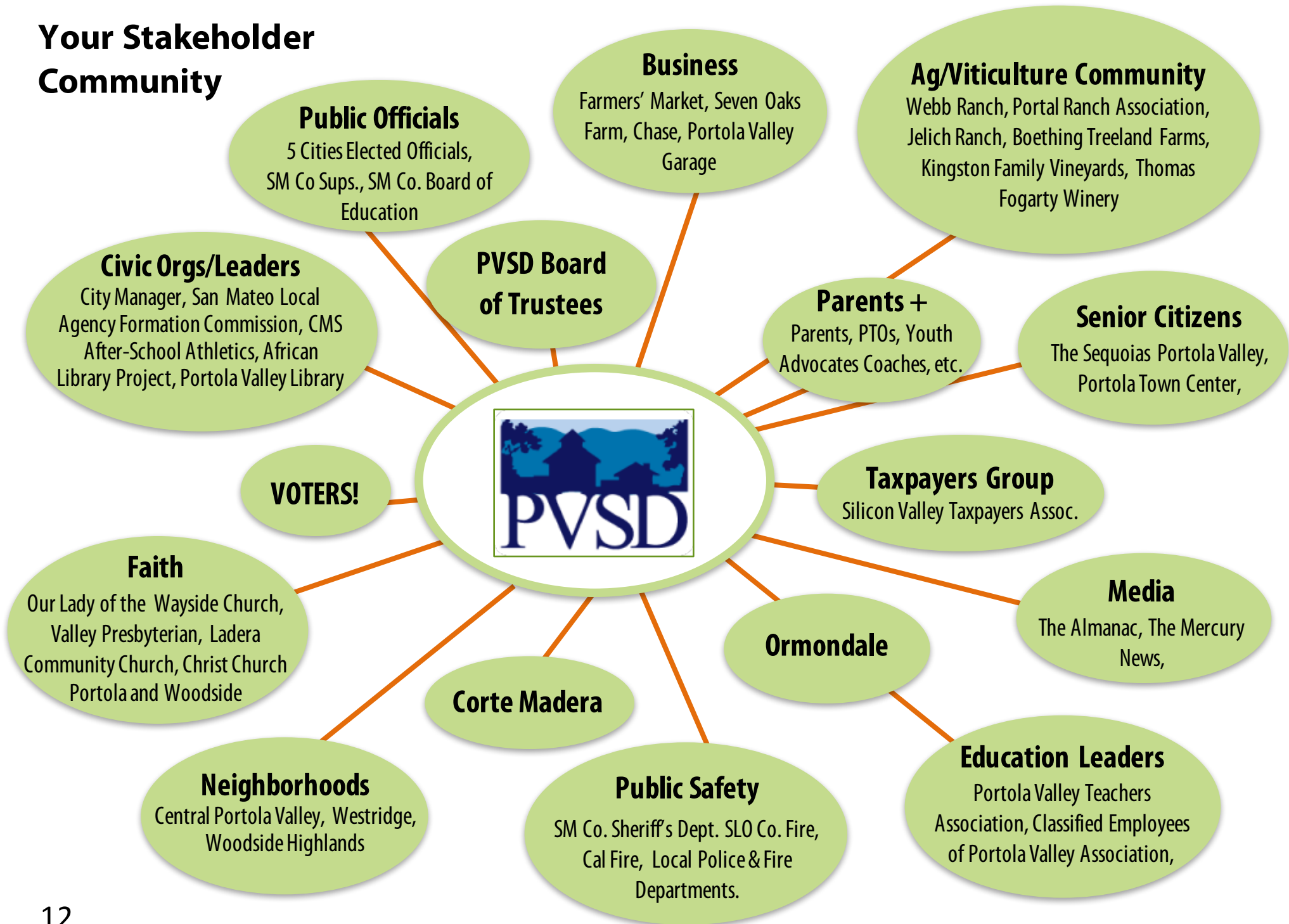
1. ENGAGE

Tell Our Story!

2. LISTEN!

3. TRACK

Your Stakeholder Community



What Listening Looks Like

School Sites

- Teachers, Principals, Staff and Students
- Parents, Volunteers, Supporters

Opinion Leaders

- **Skeptics AND Likely Supporters**
- Civic – business, education, youth, etc.
- Influencers – media, activists, others

VOTERS

- ALL Voters
- Voters who need special attention!

Track 3

Stakeholder & Opinion Leader Engagement

"People Support What They Help Create."

3 PRIORITIES to Determine Feasibility & Accelerate Preparing for the Ballot:

1. Opinion Leader Work
2. School Site Stakeholder Meetings
3. Voter Communications

WE ARE LISTENING!

Stakeholder Meetings:

1. Parents
2. Teachers /Staff

Opinion Leader Work:

1. Influencers
2. Skeptics – *with credibility.*
 - * *Whether or not they have a “title”.*



Actively Listening. Community Alignment!

Stakeholder Meetings:

GOAL: Engage stakeholders (particularly parents and school staff) at each school site and at the District Office.

DRIVERS: School Site Principals + District Leadership.

BENEFIT: Real conversations enroll stakeholders in thinking about your facilities needs – and weighing in on them. *People support what they help create.*

Opinion Leader Work:

GOAL: Engage “opinion leaders” (*people of INFLUENCE, whether or not they have a title*) who we can learn from – or who simply need attention – long before we’re on the ballot.

SUGGESTED DRIVERS: Board + District Leadership Team.

BENEFIT: Real conversations invite opinion leaders to think about the impact of your facilities NEEDS and what a local school bond for our community would mean. This is an optimal setting for candid Q&A and exchange. *People support what they help create.*

Question: Are you willing to help?

Summer/Fall 2017 Focus



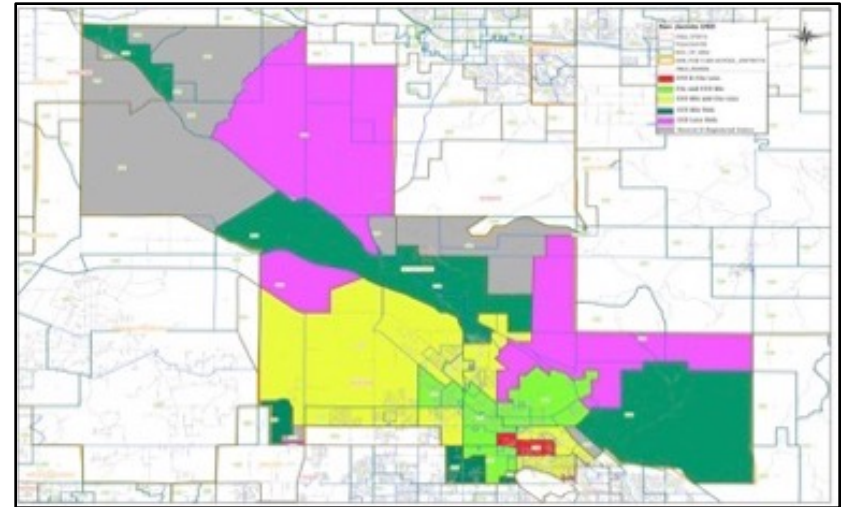
MESSAGE:

"Schools matter here. We are assessing our school facility needs. Our goal: safe, modern facilities. Our needs are REAL. We are EXPLORING OPTIONS, reaching out and LISTENING. Your opinion matters. We want your input. No decisions have been made."

What do YOU think?"

Actively Listening. Community Alignment!

Process/Tools



We need to be comfortable with, EXPECT, and WELCOME Questions & Exchange:

What are our facility and technology needs?

What are they – school-by-school?

What does our community need/want NOW/TODAY?

What will it cost to address our needs?

Will the District's plan really improve teaching and learning?

Where will the money come from to meet all these needs?

What do other school districts do?

Is a GO Bond a good solution? Is it affordable?

What are the alternatives to going for a bond?

What will a bond COST? How much will it cost **ME**?

When was the last bond? What did we get out of it?

What hits the sweet spot – between what we need and what is affordable?

How can we be assured that the money will be spent properly?

WHO makes the final decision on this? WHEN?

FACILITIES MASTER PLAN

GOAL: Build a Facilities Master Plan + corresponding Bond Plan **in alignment with your Portola Valley community.**

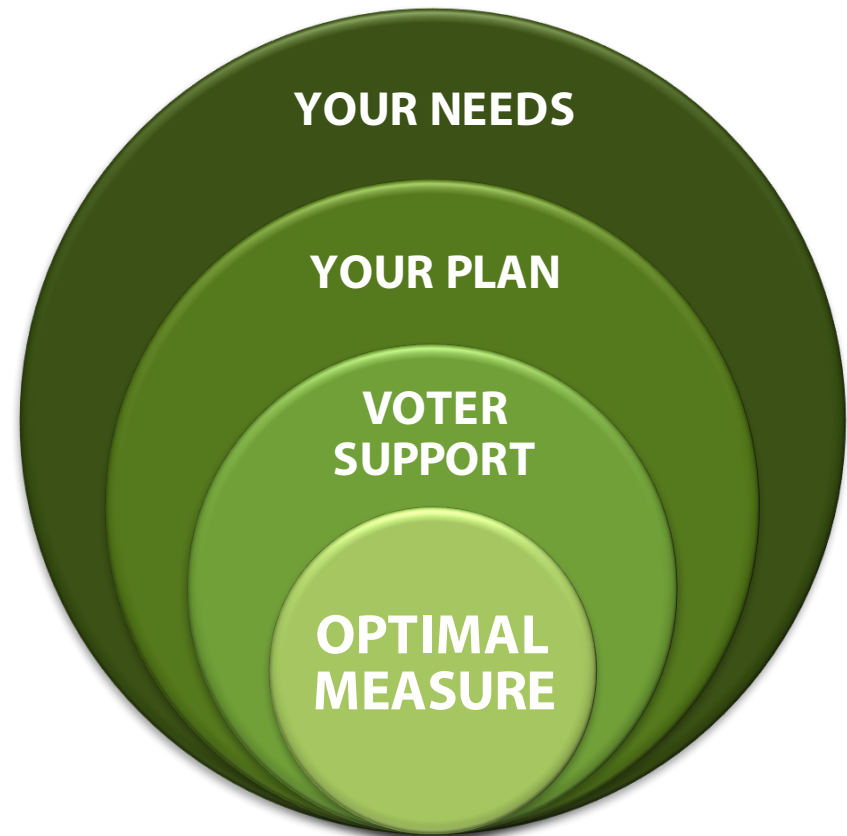
BENEFIT: Increased awareness + understanding of your NEEDS and Plan raises voter support for your Plan. *People support what they help create.*



Polling/Opinion Research

POLLING is an ESSENTIAL STEP in balancing the unique equation between *your* district and *your* community. POLLING helps package your measure for success RE:

- ▶ Ballot Language
- ▶ Tax Rate
- ▶ Specific Priorities
- ▶ Messaging & Outreach
- ▶ Targeting/GOTV
- ▶ Timing
- ▶ Funding Type
- ▶ Election Type



Electoral Feasibility

Feasibility provides the **CLARITY** needed to navigate the way forward. Three possible outcomes



1. **BEST – PROCEED TO BALLOT.** Feasibility is present. Continue — get “election ready.”

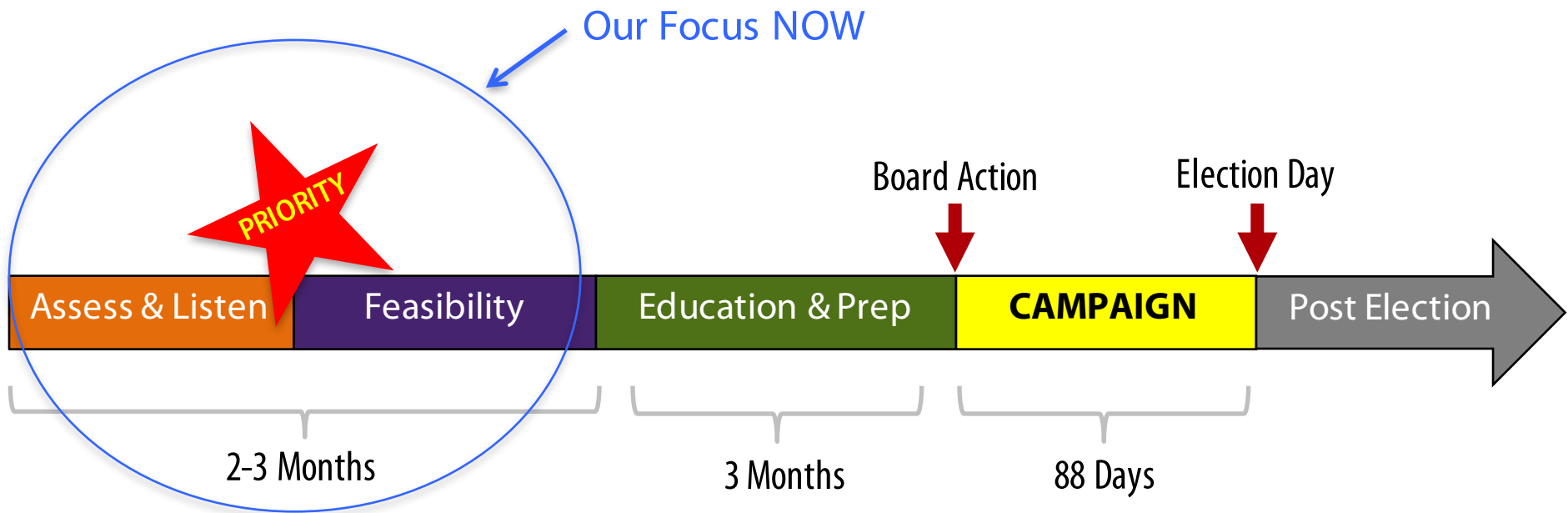


2. **PROCEED WITH CAUTION.** Some but not all signs of Feasibility are present. In this case we may move forward; however, we may face some tough decisions in order to stay in alignment with what we know your PVSD voters will support.



3. **STOP – REGROUP.** If significant risks emerge out of the Feasibility process, we will tell you so — even if it means telling you that your vision to go to the ballot in 2018 is overly ambitious and more time is needed to prepare your community for electoral success.

TIMELINE – Time is our Most Valuable Resource





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