



WHITE PAPER

Tax Elections That Win

If you were a physician, would you begin treatment on a patient without a diagnosis? If you were an attorney, would you start a murder trial before examining the evidence? If you were a student, would you take a final exam before studying?

Of course, not. You wouldn't do any of those things. But hospital districts, school districts, jail districts, libraries, fire districts and other taxing entities routinely try to pass tax initiatives without doing their homework.

And it's almost always a recipe for failure.

To win a tax election, you need to start with more than a guess and a gosh. You need to start with research that clearly identifies the exact ballot language you should use and precisely what you need to communicate to win. Research will tell you what people want – and what they don't want or are not willing to pay for. Research also provides a roadmap for your campaign, spelling out the messaging you need to use to motivate people to vote, "Yes."

You will not get statistically accurate research data by hosting community forums, doing online surveys or conducting a few focus groups. While those research methods can provide you with good "voice-of-the-customer" information, you need to conduct a random-dial, geographically dispersed telephone survey to get statistically viable results. You should conduct research that provides a +/- error factor of no more than 5 percent.

Using pre-election research effectively

Election research should provide information on the "three legs of the stool" that successful campaigns are founded on. First, voters must demonstrate they believe you have been a good steward of their tax dollars. The easiest way to determine this is to ask them to "grade" their experience with and perception of your hospital/school district/fire service, etc. You should ask for "overall" grades and grades on very specific areas – especially if your tax proposal is designed to address areas where your institution is perceived to be coming up short.

Second, voters must indicate they are at least modestly interested in following what you do. This is best measured by inquiring about information sources and how often voters turn to those resources for information about you. Information sources usually fall into three categories –

formal, informal and third party. Having a modicum of interest show up in each category is a good indication of overall interest in your facility.

Finally, voters must like your ideas well enough to pay for them. Research should always present ideas separately from costs to determine the relative merits of the ideas on their own and how much the support for those ideas drops, when the cost is revealed. Costs should be presented in such a way as to determine individual tax tolerance and always in a way the average person can understand and internalize. It's not 2 mills or a 40-cent levy; it's an additional \$10 per month for the owner of an average home. And when someone says they can't support \$10 per month, keep lowering the cost, until you find what they can support.

When these "three legs" are in place, you will have a very accurate idea of what will pass and what will fail. And you will be ready to move to the next phase of your effort.

Structuring a winning ballot proposal

Good pre-election research will provide a formula for structuring a ballot proposal that will win. The key word in that sentence is *structure*. If you ignore the research findings and run an issue that people have said they are not willing to support, you will lose. You should never assume that you can persuade people to change their minds. Never.

If the research shows people will support a quarter-cent sales tax to renovate an existing structure, then give it to them – even if your preferred idea was to do a half-cent tax for new construction. Structuring a ballot proposal that matches the preferences of your patrons is 95 percent of the battle. If research shows that only 40 percent, 45 percent or 50 percent of patrons like the half-cent idea, you are not going to win. Period. It is virtually impossible for you to move the needle far enough with the limited time and limited resources you have.

Now, that's not to say people with a vested interest in your project will not try to convince you otherwise. Well-meaning supporters and vendors might offer all types of "can-do" attitude, financial help, campaign management assistance, etc. But it's almost always a pipe dream. Consumer brands spend billions of dollars to persuade people to try their products and services and it is work that sometimes takes decades to bear fruit. Changing public opinion via a local election campaign is almost always a losing proposition.

Campaigns are where the rubber meets the road

Once you have a ballot proposal you know people will support, you are ready to do the hard work of putting on a local campaign. It is vital you understand not only what you should do, but what you should not do. At this point, the election is yours to lose. It is now up to you to do the right things in the right order. Let's start with timing.

You must realize the average person has little to no interest in your tax election and, therefore, has a very brief attention span, when it comes to messages. You want to reach people in such a manner that their interest peaks on Election Day. You do not want to give them too much information too soon.

Your campaign organization should begin no more than three months from the date of the election, and your communication efforts should begin no more than two months from the date of the election. Your first action is to develop a campaign theme that is simple, repeatable and conveys a benefit, i.e., “Say Yes to Progress.”

At three months, you should identify campaign chairs and start raising funds. At 10 weeks out, campaign chairs can start recruiting volunteers. You should begin developing all campaign tools – speaker support materials, advertising, signage, etc. At two months, you should put up a website and have your first campaign committee meeting. At six weeks, you should begin social media and speaking engagements. At four weeks, you may begin using signage and have your second campaign committee meeting. If you are doing direct mail, the first piece should drop at four weeks. At two weeks, you should begin any advertising campaign and drop your second direct mail piece. Your final direct mail piece should drop one to three days before the election.

What you are saying in your campaign is important. What you don't say is just as important. You need to have a carefully developed set of messages that EVERYONE connected to the campaign memorizes and repeats with NO DEVIATION. This is critical. You need to say what your voter wants to hear and only what your voter wants to hear. Stick to the messaging the research shows resonates with voters. Every deviation from the message is discordant and confuses the issue. Throughout your campaign, everyone on the campaign committee needs to remember this mantra of what is important to voters:

- What is the plan?
- What does it cost?
- What's in it for me?

What's in the plan should be spelled out in simple, clear language that the average person understands, with no coaching and no requirement for additional information. The cost should be expressed in whole dollars for the average person over a period of one year. What's in it for me should always be a benefit – never a feature. Benefits are often esoteric and connected to feelings. Concepts like safety, pride, frugality, sensibility, progress, etc. generally resonate with voters.

A good way to test your campaign committee's potential effectiveness is to have a written test at the end of your first campaign committee meeting. Everyone should know:

- Campaign theme
- Brief project description
- Cost to average person
- Benefit to the voter

This information should be ingrained in every committee member and no additional information should be conveyed by any member of the committee. Committee members should refer all questions to either the website or the committee chairs.

The quickest, surest way to derail a campaign is to put out too many messages, confusing messages, or conflicting messages. Never have more than ONE NUMBER (cost to the average person per year) in your campaign. Never embellish the project(s). Never assume a voter has more than self-interest at stake. Keep it simple and repeat, repeat, repeat.

The final word on fool-proof plans

So, you've followed the formula and done everything right. Do you have a fool-proof election? Absolutely not. There is no such thing as a fool-proof election. Times change, people change and circumstances change. You might be faced with a financial upheaval, such as the Great Recession or a stock market correction. You might have tragic circumstances, such as a mass shooting or an industrial accident, affect your community. Or you very well might get attacked by an anti-tax political action committee.

At the end of the day, there are simply too many factors beyond your control to ever guarantee an election victory. However, you can have a fool-proof *effort* and insure you have given yourself the absolute greatest chance for victory.