



Strategic Considerations to Help Your Ballot Measure Succeed.

An overview of levy lid lifts and other ballot measures, recent election trends, and lessons learned from both successful and unsuccessful ballot measures. Do's and don'ts in communicating with various stakeholders as well as timing, purpose and other considerations.

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Agenda

Ballot Measures: Strategic Considerations

An overview of levy lid lifts and other ballot measures, recent election trends, and lessons learned from both successful and unsuccessful ballot measures.

- Election Landscape
- Levy Lid Lift Ballot Considerations
 - Timing, purpose, type
- PDC Considerations
- Case Studies
 - City of University Place and Town of Woodway Levy Lid Lifts
 - Cities of Shoreline and Kirkland Ballot Propositions
- Do's and Don'ts; Lessons Learned

Election Landscape

Election Landscape

Election Trends

Tax measures fared relatively poorly in the November 2024 election

- More jurisdictions are proposing levies than have historically
 - 101% limit + inflation
- Voter fatigue?
 - Within a particular community, voters (who themselves are feeling the effects of inflation) may be asked for lifts by multiple taxing districts -- their county, city, fire district or library district, for example
- MRSC ballot measure database:
 - **Over 75%** (488 of 645) of levy lid lifts were approved overall since 2011.
 - At the November 2024 election, **only half** (11 of 22) levy lid lift ballot measures were approved



Levy Lid Lift Ballot Considerations

Levy Lid Lift Ballot Considerations

Several types of levy lid lifts

There are several varieties of levy lid lifts: single or multi-year bumps, lifts for limited or all purposes, and temporary or permanent lifts.

- Single bump or multi-year bump
 - Interaction with 101% limit
- Timing of election
 - Interaction with type of levy lid lift (multi-year bumps only at primary or general election)
- Temporary or permanent
 - Interaction with 101% limit over time
- General or limited purchase
 - Interaction with type of levy lid lift (limited purposes of multi-year lift must be described in the ballot)
- Cities and counties can choose to include senior/disabled exemption



PDC Considerations

PDC Considerations

Communicating with voters

When running a ballot measure, local governments must abide by PDC statutes and regulations regarding communications relating to the proposed ballot measure and the use of public resources and facilities to support or oppose the measure.

- Prohibited:

- Elected officials and staff using government facilities to promote or oppose ballot propositions

- Permitted:

- Governing Board resolution, and communication after adoption
- Individual, in personal capacity, with no use of government facilities
- “Normal and regular conduct”

- Tone, tenor, content considerations

- Objective, factual, and neutrally-worded information regarding the anticipated impacts of a ballot proposition versus promotional statements or activities, advocacy, statements (or pictures) designed to evoke an emotional response.

Practice Tip: Establish Normal and Regular Conduct Early

CLICK HERE TO VIEW OUR INFORMATIONAL FLYER:

The flyer has an orange header with the text "Blaine School District will have two school funding measures on the ballot this February:". Below this, there are two columns. The left column is titled "PROPOSITION 1" with the subtitle "Levies are for Learning: Replacement EP&O Levy". It includes an icon of a person at a desk and a magnifying glass over a dollar sign. The text states: "Our Educational Programs & Operations (EP&O) Levy supports learning and educational programs, services, and staff that are underfunded by the state (formerly called M&O levy)." Below this, it says "If approved, tax rates would be LOWER than in 2023." The right column is titled "PROPOSITION 2" with the subtitle "Bonds are for Building: Capital Bond". It includes an icon of a school building. The text states: "The proposed \$70 million capital bond would fund updates to school and school use facilities that would support all students and the greater community. It would be paid off over 25 years." At the bottom right, there is a black arrow pointing right with the text "Learn more details about these two school funding measures inside."

Blaine School District will have two school funding measures on the ballot this February:

PROPOSITION 1
Levies are for Learning:
Replacement EP&O Levy

Our Educational Programs & Operations (EP&O) Levy supports learning and educational programs, services, and staff that are underfunded by the state (formerly called M&O levy).

PROPOSITION 2
Bonds are for Building:
Capital Bond

The proposed \$70 million capital bond would fund updates to school and school use facilities that would support all students and the greater community. It would be paid off over 25 years.

If approved, tax rates would be LOWER than in 2023.

Learn more details about these two school funding measures inside.

“Normal and regular conduct”

Update community members on a normal and regular basis

- Reminders to vote before every election (not just yours!)
- Reports on operations and capital expenditures and needs
- Updates on current levies/bonds project progress or investments
- Identifying current and future residential needs

Case Studies

Case Studies

Case Study: City of University Place and Town of Woodway Levy Lid Lifts

■ University Place

Pierce County city of 35,000

Predominately residential with relatively limited commercial

Avg home value at time of levies: \$525,000 in 2022 and \$652,000 in 2023

■ Town of Woodway

Snohomish County city of 1,400

Solely residential

Avg home value: \$2.2 million

Case Studies

Case Study: City of University Place Levy Lid Lifts

- The City dedicated all its property tax to public safety expenses in 2013
- November 2022 - Single-year levy from \$0.78 to \$1.29 to fund 10 officers and 2 non-commissioned officers, and to eliminate the deficit through 2035
- Failed by 99 votes
- After failure, City took a more active role in communication. Council action delayed until the last possible date, which allowed us to continue outreach (four mailings and four community meetings in two months). Pro-levy campaign led by Council members did phone calling.
- April 2023 - Single-year levy from \$0.66 to \$1.01
- Won 52.5% - 47.5%

Case Studies

Case Study: Town of Woodway Levy Lid Lift

- In 2024, created a Public Safety Fund, which is subsidized by the General Fund
- November 2024 - Multi-year levy (six years) from \$1.11 to \$1.54, then increases by 5.5% each year for 2026 and 2027, and 4.5% each year for 2028, 2029 and 2030
- Funds six part-time officers and a camera system, and to eliminate the deficit through 2030
- Here too, delayed Council vote until last possible date with extensive community meetings and mailings (including a 20-page Q&A). Levy opponent filed complaint with PDC. PDC affirmed legality Town's communications both before and after Council vote.
- Little knowledge of the ballot measure when pro-committee knocked on doors
- Won 65% - 35%

Case Studies

Case Study: Key Takeaways

- Think ahead - way ahead. Finance managers/directors play a key role in setting up future arguments for funding.
- Have a cushion in your request if you don't know what the AV will be when tax is levied.
- Lots of communication focused on what people care about - not a laundry list of details. People care about cost (relative to total property tax bill) and what they are getting (or potentially losing).
- In person communication is highly effective because most people aren't paying attention.
- Six-year levies can be complicated, particularly given limited word-count on the ballot.
- Including tax exemption language in the ballot language could be risky.

Case Studies

Case Study: City of Kirkland (select ballot measures)

- Park Bonds: 1920, 1966, 1976, 1984, 1989
- 2002: Parks Maintenance Levy
 - Single-bump permanent: \$0.10
- 2002: Parks Bonds: \$8.4M, 20-year bonds:
 - First year rate: \$0.107
- 2012: Parks Levy: Maintenance, restoration, enhancement:
 - Single-bump permanent: \$0.16
- 2015: *Metropolitan Park District (failed)*
 - *Ability to levy up to \$0.75 but plan to levy \$0.25.*
 - *2017 State legislature change to allow MPDs to limit maximum.*
- 2020: Fire and EMS Levy:
 - Single-bump permanent: \$0.235
 - Yes vote: 71.28%

Case Studies

Case Study: City of Kirkland 2023 Levy Lid Lift for Expanded Aquatics, Recreation, and Parks Facilities, Operations, and Programs

The Kirkland City Council adopted Ordinance No. 0-4857 concerning funding for expanded aquatics, recreation, and parks facilities, operations, and programs. This proposition funds aquatic and recreation center operations, parks maintenance, year-round restrooms, park rangers, beach lifeguards, sports courts, teen services, and green loop trail networks by increasing the City's regular property tax levy to a maximum rate of \$1.38386/\$1,000 of assessed valuation (generating approximately \$10,800,000 for these purposes) for collection in 2024. The 2024 levy amount will be the basis to calculate subsequent levies (RCW 84.55). Qualifying seniors, disabled veterans, and others would be exempt (RCW 84.36).

- 2021-2022: PROS Plan
- September 2022 – March/May 2023: Parks Funding Exploratory Committee: 45 members
- April 2023: Community Survey
- June 2023: Financial Forecast: 19.8% drop in Median residential property value
- July 2023: Council voted to go to ballot
- September – October 2023: Community Education following PDC guidelines
- November 2023: Measure failed: Yes: 40.55%, No: 59.45%

Case Studies

Case Study: City of Shoreline Ballot Measures

- **2006:** Parks and Open Space Bond
 - \$18.8M, 15-year bonds
- **2010:** Basic Public Safety, Parks & Recreation, & Community Services Maintenance & Operations Levy
 - Six-year permanent levy lid lift. Max levy rate: **\$1.48.**
- **2016:** Basic Public Safety, Parks & Recreation, & Community Services M&O Levy
 - Six-year permanent levy lid lift. Max levy rate: **\$1.39**
- *2019: Aquatic, Recreation and Community Center and Parks and Recreation Improvements: \$103.6M, 20-year bonds (failed)*
- *2021: Parks and Recreation Improvements: \$38.5M, 20-year bonds (Yes: 72.12%; failed to validate with 122 votes short)*
- **2022 (February):** Parks and Recreation Improvements:
 - \$38.5M, 20-year bonds
- **2022:** Maintenance and Operations Levy for Public Safety and Community Services
 - Six-year permanent levy lid lift. Max levy rate: **\$1.39**

Case Studies

Case Study: Key Takeaways

- Think ahead - way ahead. Interdepartmental staff team and reminders that staff's job is to present City Manager/Council with information they need to make a decision about going to ballot.
- Know the context of your community and what perceptions people may bring to conversations about various types of ballot measures.
- Right-sized community committee for making recommendations. Plus, additional community education and input.
- Property tax is complex. Assess how to explain in your community's context.
- Capital \$ + Operating \$ = hard to fund together in one measure in a simple manner.



Do's and Don'ts: Lessons Learned

Do's and Don'ts

Lessons learned: Type of levy

Lessons learned from both successful and unsuccessful ballot measures.

- Type of levy
 - General purpose levy lid lift
 - Limited purpose levy lid lift
 - Special purpose levy such as EMS, affordable housing levy
 - Special purpose district such as metropolitan park district, transportation benefit district
- Considerations
 - Part of regular levy or additional levy
 - Part of regular debt limit or separate debt limit
 - Voter considerations?

Do's and Don'ts

Lessons learned: Timing of levy

Lessons learned from both successful and unsuccessful ballot measures.

- Timing of levy
- Do
 - Identify election date; confirm conforms to type of measure that can be placed on that election date
 - Consider “plan B” election date
 - Begin planning for levy well in advance of resolution deadline
- Considerations
 - “Best” election dates?
 - Other considerations?

Do's and Don'ts

Lessons learned: Levy purpose

Lessons learned from both successful and unsuccessful ballot measures.

- General or limited purpose
- Do
 - Early engagement to understand community support for various purposes
 - Surveys, budget process, other...
 - Include only a single subject in the ballot measure (whether general or limited)
- Considerations

Do's and Don'ts

Lessons learned: Temporary or permanent levy

Lessons learned from both successful and unsuccessful ballot measures.

- Temporary or permanent
- Do
 - Plan for the next levy (as well as other levies) when putting together a levy
 - Understand plans of overlapping jurisdictions
 - Take care in describing levy as “permanent” when effect of 101% limit means a future levy will become necessary
- Considerations

Do's and Don'ts

Lessons learned: Communicating with stakeholders

Lessons learned from both successful and unsuccessful ballot measures.

- Communicating with various stakeholders
- Do
 - Establish normal and regular conduct early
 - Create fact sheets for elected officials and employees to refer to in response to questions
 - Establish protocols for taking public comment at public meetings and elected official response
 - Provide training to elected officials and employees
 - Designate person for media and other inquiries regarding ballot measure
- Considerations

Resources; Questions

