



Seven Steps to Winning a School Finance Election

(You can't begin with Step 6!)

A Banach, Banach & Cassidy Insights Report

Successful school districts don't leave community engagement to chance. Instead, they involve residents early, often, and meaningfully—well before a financial proposal appears on the ballot. They share their best insights, invite feedback, and collaborate with community members to develop a shared vision and actionable plan for the future.

In contrast, school districts that struggle at the polls often have common characteristics: limited or ineffective community engagement, unclear goals, and poor timing. Too many school districts wait until a proposal is on the ballot to begin public outreach, which restricts what they can communicate under election laws and suggests that community support may be lacking.

We believe it is time for a smarter, more strategic approach. Below is a step-by-step guide to help school districts build lasting support for their financial proposals, from the ground up.

Step 1: Analyze Your Current Situation and Explain Your Vision

Start by conducting a thorough assessment of your school district's current challenges and future needs. Develop a vision that reflects what's both necessary and possible. Whether you're considering a bond, a sinking fund, or a strategic initiative, your vision should clearly outline the issues and propose well-reasoned solutions.

Example: If you're evaluating school facilities, building conditions, enrollment projections, and the costs and benefits of renovation versus new construction, community members will naturally ask:

- "What is the school district thinking?"
- "What's the vision?"
- "What's the plan, and how long will it take to achieve it?"

Clear, thoughtful answers to these questions are essential. People want to know what their leaders believe is best. Notably, they are much more likely to support a vision they believe they helped shape.

Step 2: Engage a Representative Group of Citizens

Once a draft vision is in place, bring it to the community. Share your analysis and vision, outline your proposed plan and timeline, and invite input to refine what you have done. (We like to invite the people we engage to “strengthen our thinking.”)

There are two crucial aspects to this step:

1. **Diverse Representation:** Don’t just consult supporters, a few influential voices, or your educational colleagues. Engage a broad cross-section of the community—students, staff, parents, residents without school-aged children, political leaders, and even known critics. These are the people who will ultimately vote.
2. **Constructive Engagement:** Engagement is not a “one and done” proposition. It is a process that takes time and skilled facilitation. The goal is collaboration, not confrontation. If disagreement and conflict dominate the engagement process, you can expect them to resurface during the election campaign.

Step 3: Expand the Engagement (and understand the feedback)

Don’t limit your community engagement process to 20 or 30 people.

To engage more community members, schedule a series of focus panels that involve residents from various demographic groups, including school employees, community influencers, long-term residents, parents, and residents without school-age children. Engaging 10-12 people in 10-12 focus panels for 75-90 minutes works well.

Finally, consider conducting an online survey to gauge people's thoughts on your vision and plan. This low-cost initiative should be open to the entire community. After all, what is more powerful than saying, “We invited everyone to participate in the process before we scheduled an election.”?

Step 4: Test for Support

Ask participants if they support the shared vision and the plan.

- If the answer is no, return to Step 2.
- If yes, move forward confidently yet cautiously, recognizing that opinions can shift over time.

Step 5: Present to the Board of Education

Present the engagement process results, the final vision, and the implementation plan at a public Board of Education meeting. Emphasize who was engaged and how the proposal will benefit the educational program and the broader community.

Board members should ensure they listen throughout the engagement process, from shaping the vision to understanding what people say during community meetings. They also must understand that a

unanimous Board's support for placing a proposal on the ballot is a powerful signal of unity and leadership.

Step 6: Launch an Informational Campaign

Once the proposal is officially on the ballot, school districts can only share non-advocacy, factual information with voters. The vehicles for doing this are numerous, ranging from direct mail and social media to website postings and feedback sessions.

School districts cannot solicit a YES vote. That is an appropriate task for a citizens' committee. (Those who participated in the engagement process are ideally positioned to form an independent advocacy committee to promote the ballot proposal and encourage a YES vote.)

Step 7: Communicate After the Vote

A successful election is not the end—it's the beginning of the next chapter. Follow up with ongoing communication to remind the community about the vision and the progress of the plan's implementation. This isn't just good practice, it's the first step in preparing for your next election. Keeping the community informed builds trust and maintains the momentum of engagement.

Winning school finance is about leadership, collaboration, and timing. Engage early, listen with an open mind, build consensus, and communicate clearly before, during, and after the vote.

These seven steps will help your school district enhance public understanding and community support while you build a brighter future for your students and your community.

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