



Planning for a Parcel Tax Renewal

Mountain View Whisman School
District

September 21, 2023

Jeremy Hauser, Founding Partner

TCX About TeamCivX

- Strategy and communications consultants specializing in public finance ballot measures
- Long track record of success in Mountain View Whisman SD
- We help you:
 - Assess the feasibility of a measure
 - Determine the best election date, tax rate, program funding priorities
 - Develop the measure and qualify for the ballot
 - Tell your story to the community regarding your funding needs

TCX About Measure B

- Last renewed in May 2017 w/ 72% support
- Locally controlled source of funding used to:
 - Provide academic support at every elementary school for English language learners and those students having difficulty with the basics like reading, writing or math
 - Support programs focused on 21st-century skills like science, engineering and computer science
 - Maintain up-to-date textbooks and instructional materials
 - Offer competitive compensation so the best teachers can continue to live and work in this expensive area
- Includes citizens' oversight and annual audits
- Exemptions for seniors and individuals receiving SSI & SSDI
- Set to expire in July 2025



Parcel Tax Planning Timeline



- Voter Survey
- Election Timing
- Parcel Tax Amount
- Tax Rate
- Political Landscape
- Tax Structure
- Potential Controversy

- Non-advocacy communications
- Stakeholder outreach
- Write resolution
- Finalize ballot question

- Fundraising
- Direct Mail
- Lawn Signs
- Endorsements
- Texting
- Digital
- GOTV



Upcoming Parcel Tax Election Dates

2024

March 5: Statewide Primary Election (qualification deadline December 8, 2023)

April 2: Regular Special Election (qualification deadline January 5, 2024)

May 7: Mail Ballot Special Election (qualification deadline February 9, 2024)

August 27: Mail Ballot Special Election (qualification deadline May 31, 2024)

November 5: Presidential General Election (qualification deadline August 9, 2024)

2025

March 4: Regular Special Election (qualification deadline December 7, 2024)

May 6: Mail Ballot Special Election (qualification deadline February 8, 2025)

TCX Phase I — Feasibility Study

Goal: Answer the basic strategic questions that will set you on a path to success:

- ✓ Does a parcel tax stand a reasonable chance of achieving two-thirds support?
- ✓ What tax rate fits within the tolerances of your community? Is a cost-of-living adjustment possible? What sort of sunset is feasible? Is a square-footage rate possible?
- ✓ What programs are top priorities for your voters?
- ✓ What controversies should be avoided?
- ✓ Does sufficient awareness of your funding needs exist?
- ✓ What is the right time to go to the ballot and how does projected voter turnout in upcoming elections impact a parcel tax measure?
- ✓ What other competing measures or issues are on the horizon that could impact your measure?
- ✓ How does the economy and political environment impact your measure?



Phase II — Awareness Building

Goal: Make sure parent and non-parent voters understand your funding needs:

- ✓ Develop informational messaging and a plan to get the message out to target audiences
- ✓ Talking points, frequently asked questions and a message training so all school district representatives speak with a single voice
- ✓ Utilize all available communication channels to deliver a consistent message, including direct mail, social media and online advertising
- ✓ Inform internal stakeholder groups, including teachers, principals, parent leaders, employee associations and others
- ✓ Inform external stakeholder groups including elected leaders, business leaders, ethnic community leaders, faith community leaders, taxpayer groups and others



Phase III — Measure Development

Goal: Build a parcel tax renewal measure with the highest likelihood of success:

- ✓ Recommend final tax rate, tax structure, annual adjustments, accountability mechanisms and duration
- ✓ Refine the final program descriptions to ensure they are written in clear language the general public will understand
- ✓ Work with legal counsel to get every word right in the 75-word ballot question
- ✓ Develop and refine all language that will appear in the ballot pamphlet mailed to voters
- ✓ Present recommendations, documents and resolutions to the Board for approval
- ✓ Work with local elections officials to ensure your measure qualifies for the ballot

TCX Phase IV — Independent Campaign*

Goal: Persuade and mobilize two-thirds of MVWSD voters to vote Yes:

- ✓ No public funds or resources may be used to advocate for a parcel tax measure
- ✓ Strong fundraising and volunteer recruitment are essential
- ✓ Build a broad coalition of influential supporters
- ✓ Compelling persuasive communications targeted precisely
- ✓ Effective GOTV mobilization strategies
- ✓ Efficient use of financial and volunteer resources

**Services not part of agreement with MVWSD. A proposal for campaign consulting services will be provided to an independent campaign committee when it forms.*

**TEAM
CIVIX**

Questions?

