

GEORGE K. BAUM & COMPANY'S RESPONSE TO

DISTRICT 58

RFQ | COMMUNITY ENGAGEMENT PLAN | JULY 26, 2019





George K. Baum & Company
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July 12, 2019

Administrative Team
Downers Grove Grade School District 58
1860 63rd Street
Downers Grover, IL 60516

Re: Request for Qualifications – Community Engagement Plan

George K. Baum & Company, Minding Your Business and Public Opinion Strategies welcome the opportunity to present our qualifications to assist Downers Grove Grade School District 58 in developing and implementing a comprehensive community engagement plan.

Our team members have collectively been involved with hundreds of community engagement projects and referenda in Illinois and nationally, including Community High School District 99's successful bond measure that was approved by voters last year.

We have a deep understanding of how to include stakeholders in the planning process, which is essential to building strong public support for tax-related referenda. There needs to be strong community ownership of the proposed capital improvements and financing plan well in advance of the Board of Education making the decision to place a referendum on the ballot.

We welcome the opportunity to review our qualifications and proposed strategies in person with your team. We look forward to your decision.

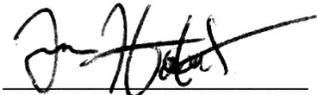
Respectfully submitted,



Paul Hanley
Senior Vice President
George K. Baum & Company



Marcia Sutter
Founder
Minding Your Business



Jim Hobart
Vice President
Public Opinion Strategies

DOWNERS GROVE GRADE SCHOOL DISTRICT 58

Request for Qualifications - Community Engagement Plan

Philosophy. How do you define “community engagement?” What elements are essential in this work?

When it comes to community engagement, our focus is on involving all stakeholders in the planning process. Not just your board members, leadership team, staff, parents and other highly supportive community members—what we would refer to as “your base”—but rather all residents, business and civic leaders within the district.

Reaching “beyond your base” is critical, especially since 70 percent of your electorate likely does not have school-age children. Highly effective community engagement requires using multiple avenues of communication, with a special focus on listening. In the end, your proposal needs to be the community’s proposal.

The most important tools at District 58’s disposal include a citizen task force to vet funding options, informational mailers, earned media, a mail survey, scientific phone poll, social media and community outreach meetings.

Your electorate is busy and often disengaged from school issues. You need make it as easy as possible for them to get information on your facility needs and proposed solutions. It’s critical to have partners who know what works—and does not work—when it comes to community engagement.

The process is part art and part science, and we are expert at it.

Approach. What is your typical process? Please provide details about the types and numbers of stakeholders you might involve and the meetings you would conduct. What are the tools that you would use to gather and present feedback? What resources would you require from the district and what involvement would you expect from the District staff?

The community engagement approach that our team will use can be broken into three phases: *Needs Assessment (“the Homework Phase”), Public Outreach and Public Opinion Research (“Community Comment”)*. The approach is focused on respecting your stakeholders and only making the decision to place a bond measure on the ballot after it has been properly vetted by the community.

PHASE 1: NEEDS ASSESSMENT

Needs Assessment includes a kick-off meeting; preparing budgets, timelines, and databases; addressing preliminary community input; tackling preliminary community opinion research (if needed); identifying and recruiting Citizen Task Force members; and developing core arguments and a voter analysis. This foundational work will be the basis for a successful outreach effort.

Comprehensive Voter Analysis & Review of Timing Issues

Our team will prepare a detailed voter analysis based on historical voting records for the District, projected voter turnout, demographics of the electorate and other important data. This information is extremely important when developing a public information program and when preparing a random stratified sample for future polling of likely voters. Voter demographics change from one election to the next and it's important to understand these demographics.

Kick-Off Workshop / Training / Overview of Planning Efforts Completed to Date

The kick-off training workshop will allow District 58 staff and board members to get to know us, learn about our approach, and share their thoughts on the District's needs and proposed solutions—including a summary of all planning efforts completed to date. We believe that having the full team meet builds strong working relationships and leads to the best outcomes. A preliminary timeline and budget will be reviewed at this meeting, and a final version that includes District input will be supplied shortly thereafter.

Key Influencer Database

We will guide District 58 in developing a key influencer database. This database will include community opinion shapers such as business leaders, civic leaders, education leaders, faith-based leaders, major property taxpayers and other community opinion shapers and stakeholders in the district. Identifying these community leaders is a critical initial step in our proposed approach.

Preliminary Messaging & Supporting Data

We will closely work with the District in developing your preliminary messaging, with a special focus on describing the planning efforts completed to date, the District's highest priority capital facility needs, possible solutions, estimated costs and anticipated benefits tied to proposed solutions.

Gathering Preliminary Community Feedback on Consolidation as a Strategy

There is one very important question that the Board of Education will need to address before it can develop one or more comprehensive funding proposals to share with a Citizen Task Force: Is the consolidation of schools a strategy that voters would support in addressing the District's capital facility needs? Voters in some school districts have been supportive of closing underutilized schools, while voters in other districts have been adamantly opposed to this strategy—even if it meant paying more in ongoing operations and maintenance. To address this important question, our team recommends the District assemble a group of 10 to 15 major community opinion shapers to discuss the issue. We also recommend community input be gathered via community outreach meetings and a benchmark phone poll. The decision regarding pursuing consolidation is so important to the success of the final plan that it must be thoroughly addressed right out of the chute.

Refine Proposal & Messaging

After community feedback is gathered and reviewed, and the Board of Education has made a decision on the use of consolidation as a tool in the capital facility planning effort, our team will assist the District in updating its core messaging and defining what will be shared with a Citizen Task Force.

Citizen Task Force to Vet Proposal

As part of the *Needs Assessment* phase, our team recommends the formation of a Citizen Task Force. This would include 30 to 35 key community opinion shapers who will vet the proposal. This is NOT a rubber-stamp group, but rather a group of citizens who will truly vet the proposal(s), provide recommendations on refining the plans and pursuing and composing a bond measure (if necessary). Those who participated in the vetting of the use of consolidation should be invited to participate.

Our team will assist with preparing the timeline and agenda for the Task Force meetings. A representative of our team will attend the meetings and assist with facilitation. We anticipate three to four task force meetings over the course of this engagement. After the second meeting of the Citizen Task Force, the group will be asked to make recommendations on what should be shared and tested districtwide.

Final Messaging

After gathering feedback from the Citizen Task Force and the decision is made as to the proposal(s) to be shared and tested districtwide, we will work with the District in refining the final messaging, including preparing a frequently-asked-questions (FAQ) document and fact sheet.

PHASE 2: PUBLIC INFORMATION PROGRAM

Implementing a comprehensive public information program with a consistent message is critical. It's important that District 58 flush out any and all concerns that taxpayers may have well before a ballot measure is pursued.

Communicating with Registered Voter Households

Following efforts to gather feedback from community opinion shapers, our team recommends expanding the audience to include all registered voter households. Again, we are prepared to assist District 58 with issue framing and messaging, copywriting, graphic design, print and mail oversight, and other tasks associated with this portion of the program. We recommend that at least two informational pieces be sent to all registered voter households.

Video Tour

District 58 will want to consider developing a short informational video. The video might include a tour of parts of various schools to illustrate facility challenges as well as images (or other media) tied to the proposal solutions. The video would be posted on the District's website and shown at meetings.

Community Outreach Meetings

We also recommend that District 58 host multiple community outreach meetings. These meetings would be open to all residents. The outreach meetings might include presentations by the Superintendent and architect as well as facilitated table discussions. Discussions of this nature are scripted so that the same topics are discussed by all attendees and data can be tabulated. Feedback gathered at the outreach meetings is helpful in refining plans and informing the quantitative research included in Phase 3. We recommend promoting community outreach meetings via existing publications, electronically, other direct mailers and earned media.

An email exit survey at the outreach meetings is also recommended. It will provide attendees with the opportunity to share additional information.

Our team will work with the District on meeting schedules and logistics including scripts, timed agendas and presentation materials. We will also assist with recruiting and training discussion leaders and provide a full analysis of the feedback.

Social Media

District 58 will want to use any and all existing social media tools currently used, including Facebook, Twitter, YouTube, Instagram, Flickr and Next Door platforms to share information and promote meetings. Our team will help create a calendar for this effort.

PHASE 3: COMMUNITY OPINION RESEARCH

After the public information program has been implemented, our team recommends that District 58 conduct two types of surveys—a mail survey and a statistically valid telephone community opinion poll.

Mail Survey

Mail surveys are an excellent method of informing taxpayers about your facility needs and proposed solutions, in addition to gathering feedback. They are best described as a "town meeting from your kitchen table." Rather than giving only a small random sampling of voters in District 58 the chance to voice their opinion, the mail survey would be sent to every registered voter household in the district. The information gathered at the community outreach meetings may be used to inform the mail survey. The results of the mail survey often play an important role in refining the scientific phone poll. Our team will develop the mail survey questions, provide graphic design and copywriting services, oversee production and mail services, oversee data entry services and analyze the survey results.

Scientific Phone Poll

Successful funding proposals are founded on research and testing. In addition to a mail survey, we recommend that District 58 implement a scientific phone poll. Jim Hobart of Public Opinion Strategies (POS) will be responsible for the development and implementation of the poll.

The purpose of the poll will be to determine voter attitudes, test support for District 58 and the proposed bond request, test support for other tax measures that may be on the ballot, determine voters' tax sensitivity, properly frame issues and identify likely swing voters. The interviews will be conducted during a 3- to 4-day period.

Led by POS, our team will work closely with District 58 staff in designing the survey instrument. Before beginning the survey pre-testing, POS will provide the District with a copy of the survey script for review. Time will be allocated for review and any necessary script revisions.

All telephone interview questions are pre-tested on a small sample by experienced interviewers to identify unclear wording and unproductive questions. Time is allocated for preview of the pretest results with the client and revisions before beginning data collection for the survey.

Sample selection is a critical factor to ensure accurate survey results. POS will use a stratified random sampling. Trained and experienced interviewers will conduct the survey from a single site, with a supervisor monitoring the work.

Interviewers receive specific training with special instructions for difficult questions and probing. Following the conclusion of the survey, District 58 will be provided with a scientific statistical analysis (including a graphic analysis and thorough cross-tabulations). The data will be summarized using statistical analysis software which will create qualitative classifications and responses for the various demographic variables surveyed.

Task Force Recommendations

The results of the mail survey and phone poll will be shared with the Citizen Task Force. A representative of George K. Baum & Company and/or Public Opinion Strategies will be available to discuss the mail survey and phone poll results with them. Their feedback will be used by the Board of Education and administrative team to determine next steps.

Ballot Question(s)

If the Board of Education decides to move forward in placing a bond question on the ballot, our team is prepared to provide input on the ballot question prepared by District 58's bond counsel. Sometimes the ballot question is the ONLY information that a voter may read prior to deciding on the measure. It is important that the information presented in the ballot question takes into consideration the public opinion research.

Follow-Up Correspondence

We recommend that District 58 send a follow-up information piece to registered voter households which would provide the electorate with an update on the mail survey and phone poll results, as well as actions likely to be taken by the Board in connection with the bond ballot proposal.

Experience. *List community engagement projects you have led in the past, especially those with similar project scope or community demographics of District 58. What were the key skills you brought to those projects that made them successful?*

The best examples of our team's community engagement capabilities include work completed for Community High School District 99's, Maine High School District 207 and New Trier High School District. Many of the same steps outlined in our proposal for District 58 were implemented as part of community outreach programs pursued by these three districts, including the use of a citizen task force, informational mailers, outreach meetings, mail survey, phone poll, website updates and more.

We strongly believe that our involvement in defining the final proposals, our ability to define messaging that was carefully crafted after listening to taxpayers, our work in getting community opinion shapers involved in the planning process and our leadership in making sure these districts stayed on message, are important reasons why each of clients were successful at the ballot box.

Furthermore, the scientific phone polling for all three of these projects was almost identical to the final results.

Community High School District 99

In March 2018, District 99 passed a \$136 million bond measure to update and improve the district's two high schools. Facility improvements included new secure entry vestibules, ADA improvements, updated classrooms and labs, air conditioning, cafeteria improvements, learning commons and auditorium improvements. The measure passes with 61% support.

Maine Township High School District 207

In November 2018, Maine 207 passed a \$195 million bond measure to update and improve the district's three high schools. Among the improvements that are currently being addressed by the bond issue include new front entrances, ADA upgrades, replacing outdated mechanical systems, right sizing and relocating special education spaces, updating library media centers and other improvements. The measure passed with 61% support.

New Trier

In 2010, New Trier obtained only 35% support for its bond proposal. After retaining our team and going through our three-step process and implementing a strong campaign, the district was able to garner 65% support for an \$89 million bond measure. The bond funded high priority improvements to its Winnetka Campus, including new core academic classrooms, science labs and library, new instructional space for music, theatre and art programs, replacement of the 1912 cafeteria, replacement of outdated heating and cooling systems, safety and security improvements, underground storm water detention vaults, and improvements that will enhance accessibility for people with disabilities.

References. Please provide at least three references who can attest to your community engagement work.

Community High School District 99, IL *(Hanley, Hobart, Sutter Reference)*

Dr. Hank Thiele Superintendent
630.795.7102
hthiele@csd99.org

Maine Township High School District 207, IL *(Hanley, Hobart, Sutter Reference)*

Dr. Ken Wallace
Superintendent
630.795.7102
kwallace@maine207.org

New Trier Township High School District 203, IL *(Hanley, Hobart, Sutter Reference)*

Ms. Niki Dizon
Director of Communications and Alumni Relations New Trier Township High School District 203
847-784-2666
dizonn@newtrier.k12.il.us

Northbrook/Glenview School District 30, IL *(Hanley Reference)*

Dr. Brian Wegley Superintendent of Schools
Northbrook/Glenview School District 30 815.400.4190
bwegley@district30.org

LaSalle-Peru Township High School District 120, IL *(Hanley, Hobart Reference)*

Steven R. Wroblewski Superintendent of Schools
LaSalle-Peru Township High School District 120, IL 815.223.2372
swroblewski@lphs.net

Service / Our Team. *Who are the specific team members who would be assigned to our project? What would be their specific roles? Do you outsource any portions of your work? Please list all assignments performed by the proposed key team members over the last 12 months.*

The senior members of our team assigned to this engagement include Paul Hanley, Marcia Sutter and Jim Hobart. These professionals have extensive public policy, campaign, polling, marketing and communications experience.

Mr. Hanley will serve as the project lead overseeing all services provided by our team to District 58. Marcia Sutter will play a lead role with community outreach meetings and training, assist with the facilitation of task force meetings, and be involved in the development of direct mail pieces. Jim Hobart will oversee the development and implementation of the scientific phone poll.

Paul Hanley, a Senior Vice President with George K. Baum & Company, has been involved with hundreds of successful tax-related ballot measures over the past 27 years on behalf of school districts, community colleges, municipalities, counties and special districts throughout the nation.

Among the Illinois clients Mr. Hanley has assisted with community outreach programs include:

- Brookwood School District
- City of Palos Heights
- Community HSD 99
- Des Plaines Library District
- Glenview Park District
- Huntley Area Library District
- Joliet Park District
- LaSalle Peru Twp HSD 120
- Lemont Library District
- Maine Twp HSD 207
- Mount Prospect SD 57
- New Trier Twp HSD
- Northbrook-Glenview SD 30
- Village of Franklin Park
- Village of Villa Park
- West Chicago Park District

With a strong commitment to meeting both the needs of his clients and their respective taxpayers, Mr. Hanley has been extremely successful in helping to generate strong voter support for bond ballot measures and other tax-related referenda. He coordinates a team of seasoned public policy, communications and public opinion research professionals who are uniquely experienced in helping public entities implement comprehensive public information programs and precisely defining what taxpayers may—and may not—support when it comes to ballot measures to fund capital improvements and/or operating needs.

Mr. Hanley's areas of expertise include public policy training, public opinion research, strategic planning, voter analyses, community task force facilitation, public information programs, bond ballot development, campaign branding and messaging, grassroots training, campaign resource allocation, direct mail, print advertising, fundraising and canvassing.

Mr. Hanley is a frequent speaker on public policy and election strategy at state and national conferences. His public policy and election work received the *Gold Medallion Award* from the National Council for Marketing and Public Relations.

Mr. Hanley holds a bachelor's degree from the University of Michigan and master's degree from the University of Colorado.

Marcia Sutter is the founder of Minding Your Business, a consultancy that provides qualitative research, project management, communication, and community engagement support to educators, entrepreneurs and non-profits. Her advertising and marketing experience, coupled with her deep understanding of public education, enable her to produce communication materials and community engagement strategies that resonate with all school stakeholders—community members, board members, parents, staff and students.

Ms. Sutter worked with the Winnetka Public Schools from 2010-2015. She developed the District's first integrated communication plan and was instrumental in completing their strategic plan. She was an Illinois School Public Relations Award (INSPRA) winner in 2011, 2012, and 2013, and received a Golden Achievement Award for Winnetka's strategic plan and community engagement project.

A resident of the North Shore, Marcia understands the culture and climate of school districts, Illinois school finance and local governance. In addition to Winnetka District 36, her education clients include Oak Park and River Forest High School District 200, Downers Grove Community District 99, Brookfield LaGrange Park District 95, Glencoe School District 35, North School District 112, New Trier Township High School District 203, River Trails School District 26, Maine Township High School District 207 and Elmhurst Community School District 205.

She holds a BS in Communication and Film from Boston University's School of Public Communication.

Jim Hobart, a Vice President at Public Opinion Strategies, has directed survey research for hundreds of projects, including surveys on behalf of cities, states, school districts and special districts throughout the nation as well as some of the nation's most active Super PACs. In 2009, Mr. Hobart was a part of the polling team that was named *Pollster of the Year* by the American Association of Political Consultants for their work on Bob McDonnell's come-from-behind gubernatorial win in Virginia. Mr. Hobart has also directed research on projects for numerous Fortune 100 clients. Mr. Hobart is a frequent contributor to National Public Radio regarding campaign strategy and public opinion polling.

Examples of clients served by Mr. Hobart include Community High School District 99 (IL), Maine High School District 207 (IL), LaSalle-Peru Township High School District 120 (IL), Hinsdale Township High School District 86 (IL), Eagle County School District (CO), Summit School District (CO), East Allen County Schools (IN), Wa-Nee Community Schools (IN), St. Michael Albertville (MN), Illinois American Water, Jackson College (MI), Lake Michigan College (MI), Congressman Peter Roskam (IL), Congressman John Shimkus (IL), Congressman Adam Kinzinger (IL), Congressman Rodney Davis (IL) and Congressman Darin Lahood (IL).

A sampling of clients served over the past 12 months by Paul Hanley, Marcia Sutter and Jim Hobart include:

Paul Hanley

Arapahoe Park & Recreation District, CO
Archuleta School District, CO
City of Loveland, CO
Falcon Fire Protection District, CO
Fowler School District, CO
Garfield School District Re2, CO
Glen Oaks Community College, MI
Huntley Area Library District, IL
Kirtland Community College, MI
Larimer County, CO
Louisville Fire Protection District, CO
Maine High School District 207, IL
Meeker School District, IL
Montezuma Cortez School District, CO
Morgan Strong (Morgan County), CO
Platte Valley School District, CO
Pueblo City Schools, CO
Salida School District, CO
Town of Frederick, CO
Town of Silverthorne, CO
Weld County School District Re8, CO

Marcia Sutter

Maine Township High School District 207, IL
Elmhurst USD 205, IL
Hawthorn School District 73, IL

Jim Hobart

Community School District 99, IL
Hinsdale Township School District 86, IL
Maine Township High School District 207, IL
Glenview Park District, IL
Brian Kemp for Governor, GA
Peter Roskam for Congress, IL

Cost. How do you charge clients? What does it include? Please provide details of your fee structure and a range of anticipated costs based on the projected scope of work.

George K. Baum & Company

George K. Baum & Company's public policy fee would be \$65,000. The services that will be provided by GKB as part of the public policy engagement include:

- Conduct a kick-off meeting/training session for District 58 staff and board members.
- Develop a comprehensive public outreach budget and timeline.
- Conduct a comprehensive voter analysis, including identifying active and likely voters, information needed for public opinion research.
- Provide guidance in development of a database of community opinion shapers.
- Prepare Citizen Task Force invite letter, meeting agendas and presentations containing factual information.
- Assist in facilitating Citizen Task Force meetings.
- Provide issue framing, messaging, copywriting, graphic design and oversight of not more than three mailings containing factual information to registered voter households.
- Prepare PowerPoint presentation for public information meetings.
- Prepare frequently-asked-questions (FAQ) document and fact sheet.
- Assist in developing script for informational video (if pursued).
- Develop mail survey to be sent to all registered voter households. Oversee graphic design, copywriting, printing, mailing of survey, data entry and analysis.
- Assist in gathering information to develop two scientific phone polls and providing input on drafts of the phone poll questions (one poll focused on testing the use of consolidation).
- Present results of the community meetings, mail survey, and phone poll to Citizen Task Force and Board of Education.
- Provide ongoing consultation in connection with its public outreach program.

Minding Your Business

Marcia Sutter with MYB will charge an hourly rate of \$100. It is estimated that her total fee would not exceed \$20,000. The services that will be provided by MYB as part of the public policy engagement include:

- Assist in facilitating community outreach and task force meetings.
- Train District staff to conduct community outreach meetings and facilitate table discussions.
- Develop online survey to gather feedback from community outreach meeting attendees.
- Assist in reviewing informational mailers and related communications.
- Participate in in-person planning meetings associated with community outreach program.

Public Opinion Strategies

For a random stratified sample of 300 likely voters, the cost of the first phone poll (to test consolidation strategies) is estimated to be \$12,500. The second poll would be longer and would test the final funding proposal(s). The estimated fee for that poll is \$19,500.

Our team will **NOT charge** an agency service fee or a separate fee for graphic design services.

District 58 will be responsible for all expenses related to the community outreach engagement including but not limited to the following: voter data (historical voting records, demographic information and related information); voter lists; printing, mailing and postage of a direct mail pieces to registered voter households; printing, mailing and postage (including business reply postage) of the mail survey; and data entry of mail surveys.

District 58 would also reimburse GKB, POS and MYB for out-of-pocket travel expenses for trips approved by the District, including airfare at coach rate, Uber and/or taxi service, parking, lodging and mileage.

Underwriting or Municipal Advisory Services

GKB will provide a separate underwriting engagement agreement—or municipal advisory engagement agreement (if a competitive sale is proposed)—for District 58’s consideration.

Contact Information:

Paul Hanley
Senior Vice President
George K. Baum & Company
hanleyp@gkbaum.com
800.722.1670

Marcia Sutter
Founder
Minding Your Business
marcia@marciasutter.com
847.917.47890

Jim Hobart
Principal
Public Opinion Strategies
jimh@pos.org
703.836.7655