

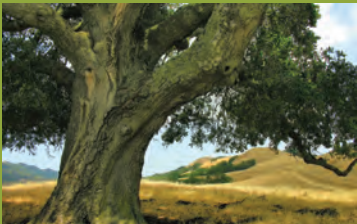
MEASURE WW

A Case Study and Reference

By Marty Boyer • As commissioned by East Bay Regional Park District • 2010



East Bay 
Regional Park District



Photos: Deane Little, Kevin Fox, and Eric Nicholas

Table of Contents

| | | |
|--|---|-----------------------|
| Letter from the General Manager | 4 | |
| Preface | 5 | |
| Overview | 7 | |
| Part One: Shaping the Measure | 11 | |
| Drafting the Measure | 13 | |
| Legal Matters | 16 | |
| Developing a Plan, Crunching the Numbers | 22 | |
| To Go or Not to Go | 27 | |
| Part Two: Assembling a Team | 29 | |
| The Case for Outside Expertise | 31 | |
| Keeping an Eye on the Public Pulse: Pollsters | 31 | |
| Your Story Won't Tell Itself | 34 | |
| Leadership | 42 | |
| Keeping Everyone in the Loop | 45 | |
| Part Three: The Emergence of the Outside Campaign | 47 | |
| The Campaign Committee | 49 | |
| Building the Team; Getting Started | Professional Fundraising | The Ground Game |
| Financing the Campaign | Minding the Treasury | The Cyber Ground Game |
| Campaign Finance Subcommittee | Chasing Endorsements | Political Consultants |
| Part Four: The Intangibles | 67 | |
| The Intangibles | 69 | |
| The Best-Laid Plans | 71 | |
| Appendices (See attached bonus CD) | 73 | |
| 1. Initial Public Communications – Report on Prior Bond Act Accomplishment, 1998 | 11. Public information and Outreach Plan | |
| 2. Rationale for Extension of Bond Measure, Key Messages, 2007 | 12. Public Outreach Meeting Agenda, 2008 | |
| 3. Reports on Prior Bond Act Accomplishments | 13. Public Outreach Presentations Staffing Calendar – Sample, 2008 | |
| 4. Tracking Poll, June 2008 | 14. Public Outreach Presentations – Final Summary, 2008 | |
| 5. Exit Poll, November 2008 | 15. Measure WW Public Information Brochure (mailer), 2008 | |
| 6. Measure WW Project List, Board Material | 16. Measure WW Major Costs (budget planner) | |
| 7. Measure WW Project List, Board Resolution Authorizing Acceptance | 17. Sample Newsclips, Editorials, Articles, Columns, 2007-2009 | |
| 8. 2008 Election Gantt Chart (project management tool) | 18. East Bay Regional Park District Ballot Measures Election Results, 1988-2008 | |
| 9. County Elections Office Elections Timetable | | |
| 10. Official Measure WW Ballot Information from Voter's Pamphlet | | |

Letter from the General Manager

In late 2008, as my staff and I reviewed exit polls and wrapped up nearly three years of work to pursue the \$500 million park bond ballot measure officially presented as Measure WW, I realized that my senior management team of baby boomers was unlikely to be around for another such effort. I was born a year prior to the war so I was probably a “Depression boomer.” Most members of the team have served East Bay Regional Park District for many years and weathered several election measures, giving us a level of experience in the somewhat surreal field of the election process that many in local government have not attained.

And so, it came to me to compile a record of our experience with Measure WW. At first, I envisioned a reference work for our successors who may appreciate a guide for this bewildering journey. Collectively, we recognized that Measure WW might serve as a useful case study to assist other local agencies being pushed rather forcefully toward the ballot process by the disintegration of traditional funding streams and an awful economy.

Speaking on behalf of the Board of Directors, my staff, and myself, we hope that you find useful insight within this narrative and the lessons we have learned and cited. Obviously, each reader will have different context and needs, and the lessons will apply differently in each case.

Finally, where a thousand thank-you’s are warranted, three will have to suffice: First, this achievement would not have materialized, nor succeeded, without our extraordinary Board of Directors who committed to the effort, proved that commitment through their actions, and gave of their own time so generously throughout the process. Second, I will always be grateful for a remarkable staff, from top to bottom, who passionately believe in the mission of the Park District and worked so hard – many of them also volunteering their off-duty time to assist the outside campaign. And finally, I wish for each reader the kind of grass-roots support for your services that we enjoy at East Bay Regional Park District. It was community activists, park users, and partners in the community who stepped up to create, finance, and conduct the campaign that the District could not. Everyone who values and uses our network of regional parks owes them their gratitude.



Pat O'Brien, General Manager

Preface

By the mid-1980s, Proposition 13 and subsequent tax reform ballot initiatives in California had resulted in dramatic decreases in available funding for local governments and eliminated most options to backfill the losses with new sources of revenue. Cities, counties, school districts, and special districts, still reeling from devastating cuts forced by Proposition 13's passage in 1978, were beginning to understand the full and long-term impacts of the landmark initiative put forward to protect taxpayers. The mother's milk of local government financing – property taxes – clearly was not going to be sufficient to operate programs and services in the future.

In response, agencies became more adept at pursuing new approaches to financing using the few tools available to them. Key among those tools was, and as of this writing, still is, the local ballot measure. This option, however, requires an agency to take its cause directly to the very voters who stood their ground against high taxes through Proposition 13 and its offspring measures. And, if asking voters to pay more taxes is daunting, the California Constitution makes it even more so by requiring two-thirds approval to pass a specific-purpose ballot measure. In addition, the fiscal and legal constraints on public officials that prohibit them from conducting a campaign make passing ballot measures a very tall order for public entities.

Until 2009, *The San Francisco Chronicle* enjoyed high readership of a front-page feature called “Chronicle Watch” which epitomized the paradox of public sentiment an agency faces when asking for more taxes. In this prominent space, the largest circulation newspaper in Northern California for many years took on the reader-reported small failures of government in the Bay Area. The feature included a photo of the broken sewer, clogged drain, unfilled pothole, broken park bench, or missing signpost that was the subject of the day's installment, and a sub-headline indicated how many days it went unattended. Often, the agency official responsible for the service featured awakened to his or her “mug shot” at the top of the column.

As Californians drew their line in the sand against tax increases and the cost of government near the end of the 20th Century, the *Chronicle* feature underscored the paradox that the public also expected a historically high standard of living and quality of life. Today's citizenry demands more and better services than ever, and demands them on an almost fail-safe level, all the while standing tough against new taxes to pay for them. Even as the economy tanked in late 2008, and thousands of public servants lost their jobs over the next year and a statewide crisis in funding for local government worsened, an unfilled pothole continued to merit protest and front-page attention by the *Chronicle*.

Local government has been on the earful end of this paradox for decades. And, they recognize that meeting the public's heightened expectations requires confronting the legal constraints surrounding elections, offering each tax-and-spend measure on its own merits, but keeping clear distance from election activities.

Today, specific-purpose ballot measures are common throughout California. Most focus on universally highly-valued services, such as schools, public safety, libraries, additional local transportation needs, and parks. Hundreds of such measures have been launched in California, but far fewer succeed. In the 2008 General Election, hundreds of local agencies asked Californians for various special tax measures. The vast majority of those that passed were targeted to raising funds for schools and were aided by a lower threshold of 55 percent voter approval for school bond measures. But for those measures seeking taxes for special purposes non-school related and requiring 2/3 vote to pass, the odds remain long against the sponsoring agencies.

Local government does many things well. Election politics are not among them, nor were they meant to be. State law strictly prohibits the ability of government agencies from conducting campaign activities using taxpayer money or taxpayer-financed staff time or resources. Yet despite the limitations, those who seek approval to levy taxes have a right and an obligation to ask the voters to consider and help pay for high priority programs – and a responsibility to fully involve and inform the public during the election process. Those entities that pose successful measures invest the time, energy, and money to involve the community, develop a detailed plan for the expenditures of the revenues, and identify partners and professionals necessary to do the job. Meanwhile, an independent complement of community supporters, interest groups, volunteers, and political professionals conduct the campaign.

This is the account of one local measure, Measure WW, put on the ballot in Alameda and Contra Costa counties in 2008 by the East Bay Regional Park District Board of Directors to extend a tax assessment for acquisition and development of regional parks and local park projects. It was the largest local park bond measure for a local park district in U.S. history and is a reflection of how one special district has repeatedly succeeded over many years in the ballot process. It provides lessons for cities, counties, school districts, and special districts considering a ballot measure. This case study is intended as record for the District's next generation of leaders who may face the task of seeking an extension of WW in 2028. We hope that it will also be a valuable resource for all local officials who may find themselves in an arena they hadn't imagined when entering public service – that of the professional who must stand apart from, yet understand and work with the election process in order to pursue their mission of public service.

Overview

This case study focuses on one revenue-raising ballot measure and attempts to share valuable information with those in local government who may be persuaded that the ballot measure is the only true, locally rooted avenue to adequately fund vital services in the community. We have attempted to marry two approaches. We offer the insight and experiences of those involved with several successful local ballot measures, and cumulative “Tips and Guidelines” in each section that can be helpful to any agency committed to putting forth the strongest possible ballot measure with the best chance of passage. We have also woven throughout a case study of one successful local ballot measure in hopes that its example helps bring the process alive for the reader. This report focuses on a process toward a ballot measure seeking bond approval, fees, or a tax.

The case study chronicles the experience of East Bay Regional Park District in November 2008, asking voters to extend a special assessment passed by the voters in 1988 as Measure AA. Its 2008 successor, Measure WW, would extend AA’s mission to purchase and develop regional parklands, and provide grants for recreational projects to local communities in Alameda and Contra Costa counties – without any increase in the tax rate over that approved in 1988. It would be expected to finance \$500 million in bonds over its expected lifetime of 20 years.

Readers may choose to assess how this election scenario contrasts with others, citing differences in political demographics of a community, popularity and image of a cause, wealth of the community, the state of the economy, and other factors. All are relevant and certainly some are weighed carefully when an agency considers the prospect of going forward with a ballot measure. In 2008, some factors weighed in favor of Measure WW; others seemed to discourage taking the risk. We hope that readers will take what they can from this experience to apply in their situations and adjust as they need to in consideration of the contextual backdrop they face.

With this in mind, a brief snapshot of the context the East Bay Regional Park District faced and factored in to all decisions may be useful. Measure WW was placed on the ballot 20 years after its predecessor, Measure AA, was passed, just as that measure’s proceeds had nearly been expended. It was one of a long menu of State and local initiatives on the ballot for November 4, 2008 – headlined by the most fascinating and spirited presidential election of our times. Furthermore, the District had gone to the voters just four years prior to ask for a special excise parcel tax (Measure CC) to finance operations. The measure passed, but would it be going to the well one too many times in 2008?

Unbeknownst to the District's Board of Directors and staff when they culminated years of consideration and planning by officially filing in the summer of 2008 to offer Measure WW, the election would ultimately be held one month after the bottom fell out of the national economy, leading to a deep and prolonged recession that continues as of this writing in late 2009. Unemployment would soon reach 10 percent in California and hundreds of thousands of Californians watched as their homes went into foreclosure. Not a great time to ask for a tax to continue.

But the District also operates in a sociopolitical community unlike any other. Its two-county jurisdiction in the East San Francisco Bay Area includes Alameda and Contra Costa counties and serves 2.5 million residents. Oakland and Berkeley are the heart of the District. It is clearly among the most liberal and environmentally conscious political communities in the nation, and the median education level in the two counties is high, thanks in part to the presence of the University of California's crown jewel in Berkeley (the university campus is geographically collared by thousands of acres of District regional parks behind it).

That identity is a major part of why East Bay Regional Park District was able to grow from its first three parks, opened in 1936, to 65 regional parks that protect more than 100,000 acres in the two counties. The parks experience an estimated 14 million visits each year from District residents and travelers seeking quality, accessible parks. It is the largest network of urban regional parks in the country. Then, too, the District enjoys widespread credit for being among the best-run park systems in the nation and enjoys a high degree of credibility and support from its park users and community. We will explore this further within this case study.

Finally – and again, to be discussed further ahead – the District is dedicated to a focused mission that leads to a high degree of unity among its staff, supporters, and a Board of Directors who can agree on their mission and broad principles even as they may disagree on steps or turns in the path to serve that mission. So, for example, an agency with a more diverse and decentralized set of responsibilities and missions, in a different community, perhaps with a lesser track record for performance in the perception of its community, may struggle to find unity among its team as they consider going to the voters. Cities and counties are examples of organizations with more diverse responsibilities; libraries, public safety, and schools are often as sharply focused in mission as a park district.

Facing both advantages and disadvantages, the East Bay Regional Park District has used the ballot measure effectively and developed a high level of expertise in presenting measures and winning voter approval. The

District correctly gauges the public's priorities, involves the community at every step, accepts that putting forth a measure is hard work and then does it. The District brings in appropriate experts or spends as needed to do the staff work right, all the while trusting community activists to carry the campaign football on its behalf.

Measure WW went to the voters on Nov. 4, 2008, in both counties. Despite last-minute crises that threatened the effort in each county – including the measure going forward without a title on the ballot material due to error by one county's registrar of voters – WW passed with more than 71 percent approving it in each county. It was the seventh ballot measure the District has put forward dealing with bonds or special assessments since 1988. Only two failed – each of those earning more than 60 percent but just shy of the required two-thirds.

It has become a cliché to view a long, challenging experience as a “journey,” but that is what Measure WW was. The final step of that journey is to capture it for future District leadership and for others in local government who may benefit.

Part One: Shaping the Measure



Introduction

Putting the right special funding measure on the ballot is hard work and involves many pieces. The two early efforts that often make or break a measure are drafting the language for the measure, and developing the plan that determines the specific projects or uses for the revenue, their costs, and a plan for implementation of the projects. Virtually every arm of a successful ballot measure effort grows organically from managing these two tasks well on the front end. For example: The best fundraiser and finance committee in the world cannot raise money unless the language of the ballot measure accurately reflects a winning cause and a well thought-out plan for using the money that responds to widespread, relevant input from the community. Further, the draft has probably been amended, edited, and perhaps even rewritten as a result of vetting it through various methods of public opinion assessment, such as polls and community relations activities.

Drafting the Measure

The East Bay Regional Park District was on a course toward Measure WW for many years. Its predecessor, Measure AA, was passed in 1988 to finance acquisition and development of parklands and would expire in 2008. If the District was to continue on its mission in a significant way, the measure would have to be renewed or extended to allow continuation of the crucial taxpayer-approved capital revenue stream. The good news was that the District had a model that had earned the required two-thirds 20 years earlier, and planners could work from that same conceptual plan. It included a successful formula for using the funds and sharing them with the communities within the two counties, a very specific project list, and a palatable tax rate. General Manager Pat O'Brien's Staff Oversight Committee for WW directed the staff effort, taking full advantage of the work he and staff had done back in 1988 and using that model to begin the painstaking job of building a new plan for a new millennium.

Then-District Assistant General Manager for Operations Jerry Kent was a key staff presence creating the 1988 plan and returned from retirement to work on updating it for Measure WW. O'Brien and Assistant General Manager Dave Collins worked with the Board of Directors at workshops to craft the measure.

Tips and Guidelines

1. Begin very early, and take your issue to every segment of your jurisdiction for public comment and input. Surveys are critical.
2. Begin with a good draft plan that includes something for every community to love. Use your staff and your policymakers to help develop the projects list and spending plan.
3. Make sure your plan provides some discretion for every community.
4. Keep it simple, understandable, and memorable. Include specifics.
5. Expect disputes and leave room for your policy-making Board to make tweaks or settle disputes.

“First rule: If you have a good model, don’t throw it out,” Kent says. “We knew that Measure AA was a good model, it had been very successful in achieving exactly what we promised the taxpayers, and equally important, we made sure they knew it throughout those 20 years.”

Nonetheless, today’s world demands ongoing, inclusive community involvement in creating a draft measure. Measure AA’s plan and ballot language were drafted in a few weeks in response to a specific opportunity (State Initiative Proposition 70 won wide support for State parks in June 1988, and with just five months to the November election, the East Bay Regional Park District saw the opportunity to put a similar

measure on the ballot to benefit its two counties). But today, ballot-weary and savvy voters are far more active and perhaps more skeptical. They demand more involvement in an election process that would add to their tax obligations or even continue existing taxes, and would also determine the future of resources as precious as the regional park system.

Kent points to nearly two years of community input meetings throughout the two counties, countless appearances before civic groups, advocacy and interest groups, local government bodies, and small citizens’ groups to get input regarding the measure. Most specifically, the District sought input regarding project priorities envisioned by the District to be financed by the revenues.

Measure WW and its predecessor, Measure AA, adhered to the above in defining the basic allocation formula for using the \$500 million in bonds being repaid through the assessment. It is a good example of how to balance regional and community needs, as well as various kinds of uses:

75 percent: District Projects

- Land Acquisition: 75 percent
- Development projects: 25 percent

25 percent: Local Agency Grant Program

- Locally-determined projects (population-based grants)

Development projects included park development, access improvements, and environmental restoration projects. Land acquisition funds are available to purchase land as it becomes available, some of which may be targeted for park development while others may be set aside as open space preserves or land-banked for indeterminate periods of time. More than 200 specific projects offered something for every community within the District.

It is vital to be realistic when determining the tax rate amount being asked of the voters. Polls and other research will reveal what amount will get what level of voter support; listen to those messages. Extending Measure WW during a dramatic period of economic recession made it even more important that the District conduct reliable public opinion polls and engage the community at every opportunity to assess what would be palatable to stressed voters. The data made it clear that their best chance to succeed was to seek a simple renewal of the AA taxing formula of \$10 per \$100,000 valuation, or approximately \$40 per household per year, based on average valuation in early 2008 – a formula which would not increase the current tax rate.

Drafting the Language: The Perfect 75 Words

Now that you have created a draft project plan and the terms of a ballot measure, how hard can it be to draft the actual 75-word measure, the word limit set by California election law? Writing a concise, effective document of any kind can require a tremendous amount of work and some discord. Philosopher Blaise Pascal once famously wrote in a long letter to a friend: *“I would have written a shorter letter, but didn’t have the time.”*

In our case study of Measure WW, consider that the District was selecting 75 words to ask taxpayers for \$500 million over 20 years. They also understood that at least a dozen people would want or need to help draft the language. Writing the ballot language can seem at first blush like a simple

procedural step. In reality, it can become a make-or-break project that requires much patience and compromise, and can determine the election's outcome.

General Manager Pat O'Brien, Assistant General Manager Dave Collins, District in-house Chief Counsel Ted Radosevich, and Assistant General Manager Bob Doyle (Land Acquisition) created a first draft with the help of pollster Dr. G. Gary Manross. In addition, the District had to work with bond counsel to ensure language that would be acceptable to financial firms who would be needed to issue bonds through the life of the measure. A Board of Directors legislative committee, political consultants, and, of course, attorneys, all had ideas about the magic 75 words that would be most accurate and most successful at the polls. For example, significant discussion emerged in determining whether the measure would be referenced as a "continuation" of Measure AA or an "extension." Public opinion prevailed when Manross' surveys determined that the word "extension" clearly outpolled "continuation," although even Webster would have difficulty defining the distinction between the two words. In fact, the word "renewal" was the choice favored by staff.

As painstaking as the drafting was, the exact measure language was the subject of the most disruptive detour en route to Election Day when one elections official in Contra Costa County disputed the submitted language, which came in at 75 words plus a title. The official ruled that the 75 word count must include the title, contrary to that official's actions in a recent election and also counter to the ruling by neighboring Alameda County. The disagreement with one elections staffer forced the Park District to rewrite just days before the deadline to carve out enough words to be accepted and get on the ballot. (See "Legal Matters" section for further information on this event.)

Legal Matters

Some of the legal tasks related to a ballot measure are obvious. Others are less so, and still others can be crises that arise and threaten the entire effort if not handled quickly. In worse case scenarios, surprise legal issues can occur as a critical deadline in the election process looms and a failure to act quickly can doom the process. Such watershed events occurred with Measure WW, and we will provide insight into handling those situations later in this report.

Overall, legal matters and tasks related to the Measure WW election cycle fell into general areas. Each is vital; any one neglected could have constituted a fatal flaw to the process:

- Satisfying bond counsel;
- Drafting of the measure (campaign filings were within the purview of the campaign committee) and approval by bond counsel, if applicable;
- Managing compliance with State campaign restrictions;
- Addressing unexpected crises.

Passing Muster with Bond Counsel

East Bay Regional Park District in-house counsel Ted Radosevich explains that he, General Manager Pat O'Brien, Assistant General Manager Dave Collins, and the District's longtime contract pollster, Dr. G. Gary Manross, worked on the actual language to satisfy the financial community. In the case of Measure WW, the District wanted to extend a special property tax rate that had been collected since passage of Measure AA in 1988. Opinion polls and a quickly developing recession led the General Manager, Board of Directors, and an emerging campaign committee to agree that the renewal measure must limit its ambitions to an extension at the existing rate with language that assured there would be no increase.

"We realized that we had to craft a ballot measure that said it won't increase your tax rate, but language that is too rigid might prevent any bond firm from issuing the bonds for us," Radosevich explains. "We needed language that stressed existing tax rate, but gave just enough flexibility that we could work with bond firms." Further, the General Manager had previously directed that he would not recommend language that didn't include the phrase, "no increase in tax rate."

It was crucial to find a reputable bond counsel firm that would join with the District to craft language to meet all needs, not just the legal requirements. The District found that creativity and skill at the highly-regarded firm of Jones, Hall, Hill & White, who worked closely with District staff, the Board, and financial and survey consultants on the many nuances of the wording.

It is worth noting that Radosevich estimates that the 75-word ballot measure went through 60-80 drafts once all the chefs in the kitchen, including Board members, had contributed their input and all ideas were examined for meaning, nuance, and priority themes. In other words, approximately one draft per word of the measure. It is probably an indicator as to why we should be grateful that elections officials do not allow 750-word ballot measures. Several near-final options were winnowed and tested by survey, as will be discussed later.

The final title for WW read as follows:

“Extend existing East Bay Regional Park District bond with **no increase in tax rate** Bond Measure WW.” (Emphasis added.)

Each word of a title must be carefully chosen for its political, factual, and comprehension value. For example, as noted earlier, the word “extend” had polled better than the word “continue” and was more accurate than “renew.” “No increase in tax rate” was a fundamental reassurance to voters facing a recession. The obvious alternative, “no tax increase,” was discarded as not accurate nor legally acceptable, since the rate remained the same but the resulting tax bill may be higher to reflect increases in the valuation of property.

The requirement to limit ballot language to 75 words became crucial to an 11th hour near-disaster for Measure WW, and will be discussed below. However, Radosevich stresses that among the lessons learned was how important it is to submit language earlier, rather than later. Flirting with deadlines through the county elections office can be disastrous, leaving no time to correct a problem or fight a battle with the Registrar of Voters. Agencies sponsoring a measure cannot assume they will be granted continuances, reprints, re-issuances of corrected materials, or other major mitigations when elections officials err. Regardless of who is at fault, an agency submitting a measure may well pay the penalty at the polls.

Ensuring Compliance with Campaign Laws

California State law clearly prohibits public employees from engaging in campaign activities during work time, or from using the office telephone, mail service, or other agency resources. Yet in the case of many ballot measures, employees have a clear vested interest – and perhaps even a personal passion – for the measure’s cause. This is increasingly the case in California, where tough fiscal times have led to budget cuts, layoffs,

and program reductions, and the ballot measure is closely related to maintaining positions and services. In such circumstances, employees may be eager to contribute their time and energy to the campaign. They are also likely to be ignorant of the law, and it is critical that agency counsel be proactive in educating staff about these restrictions and actively involved in reviewing staff work throughout the process to ensure compliance. However, this admonition should not be construed as a prohibition that precludes an agency from performing appropriate and necessary staff work to present the public with a well-planned and constructed measure, and conducting public education and outreach efforts to inform residents about that measure.

In 2009, the California Supreme Court reaffirmed the public agency's right to perform varied public outreach activities related to a local ballot measure in *Vargas v City of Salinas*, filed by opponents of public information materials issues by the City during the election period for a utility users tax measure. The Court's decision reaffirms a municipality's right to provide a "fair presentation of the facts" to residents. Furthermore, it reaffirms the governmental entity's right to publicly express an opinion with regard to the merits of a proposed ballot measure, as affirmed by the State Court of Appeals in *Stanson*, supra, 17 Cal.3d 206, 219-223. The *Stanson* decision specifically addresses the distinction between public information and the improper role of "taking sides" in an election contest," singling out the "use of the public treasury to mount an election campaign" as the suspect conduct – not the issuance of fair, factual information about the financing activities of the agency using a variety of widely distributed materials.

Radosevich has served the East Bay Regional Park District through several ballot measures and has established clear, aggressive practices to ensure safeguards against violations by staff.

Tips and Guidelines

1. Before any election is placed on the ballot by the District, issue a memo to every staff member with their paychecks explaining the restrictions and warning that they cannot campaign on District time. Warn employees that those who choose to campaign on their own time cannot say or imply that they work for the agency, cannot use the office telephone for campaign-related calls, use office mail services, or other District resources or time.
2. Legal counsel should keep away from the campaign, even during off-duty hours. In the case of WW, Radosevich believes he may have been among the few senior managers who did not get involved off-duty. He felt strongly that as the attorney, it was crucial to keep clearly separated at all times from the campaign. (Another exception was Public Affairs Division staff, whose role to oversee non-political public education and information made it important for credibility's sake to stay out of the campaign even on personal time.)
3. Although the agency itself does not take part in a campaign, the East Bay Regional Park District believes strongly that it has an obligation and legal right to provide public education and informational materials that explain the measure, its impact, and its intended purposes, and has a tradition of investing in that effort. Legal counsel should review such materials to ensure they are educational and informational only and do not cross the line to advocate for a vote or position.
4. Emphasize clear, concise, and understandable language in your legal review of materials. Radosevich believes that a measure will sell itself if the information you draft clearly spells out what you intend to do with the money and you have drafted the proper measure to reflect the public's priorities. General Manager Pat O'Brien agrees, and advises that you explain exactly what you want to get done and be specific in drafting the ballot language, as it will help you in the polling process (see related section).
5. When reviewing materials, if it looks marginal, or close, be conservative in those calls.

Managing Legal Landmines

Even when an agency puts forward the best-planned ballot measure effort aided by long experience and a dedication of necessary time and resources, there will be bombshells. Most will require legal attention. Such was the case when the East Bay Regional Park District submitted its 75-word Measure WW to its two jurisdictional elections offices, Alameda County and Contra Costa County Registrars of Voters. Alameda’s Registrar accepted the measure and its title without question. But in Contra Costa, the District encountered a far different reception when that county’s Registrar’s staff rejected the measure’s language, ruling that the measure’s 17-word title added to the word count to exceed 75 words. No reasoning, cajoling, or demonstration of neighboring Alameda County’s acceptance of the measure swayed Contra Costa elections officials, nor were they persuaded by the fact that their own office did not count the title nor interpret the rules this way with the District’s previous ballot Measure, CC, in 2004.

The General Manager and District Counsel assembled something resembling a war room and plunged into the job of rewriting Measure WW to preserve the all-important title by carving out words within the text to meet the 75-word total requirement in Contra Costa. Over the next 48 hours they struggled to glean words without sacrificing clarity or flow of the narrative. They sought advice and approval from attorneys, pollsters, and Board members, with Board Member Beverly Lane fine-tuning some wording crucial to ensure it remained in spirit and legality consistent with the language submitted in Alameda County.

“We ended up with a couple of imperfectly worded phrases, and awkward transitions where we sacrificed words, but we did it,” O’Brien recalls with a rueful chuckle.

The universe has a way of punishing those who say things cannot get any worse. The battle over 75 words was thankfully becoming a memory as Election Day approached. But flexibility was again the key when, in mid-October, Alameda County’s sample ballots arrived in voters’ mailboxes – minus **any** title for Measure WW! (See further discussion later in this report.)

Developing a Plan, Crunching the Numbers

Local agencies committed to asking taxpayers to approve a bond or special assessment measure may wish to clone their finance officer two years prior to the election. The steps to a responsible financial plan for the special purpose tax rate are many and layered. The best of budget geniuses cannot close one's self in an office and crunch a boilerplate formula to finance the cost of vaguely defined services or projects and expect it to convince the voters. Among the tasks ahead:

- Compile and estimate costs for planned projects.
- Ensure revenue streams will service the bond's debt service.
- Assess per unit taxpayer cost AND voters' tolerance to pay.
- Balance above three findings.
- Develop allocation plan (community equity must be considered).
- In the case of bond-financed measures, work with bond and legal counsel.
- Oversee and plan bond issues, grant programs, and other financial processes associated with spending the revenues.
- Overlay and match project plan with public input, poll results, etc.
- Have a reasonable plan for funding future impacts from implementation.
- Keep tweaking until it all fits.
- In the case of WW, an update to the Master Plan Map was also necessary to inform the project list planning work.

** While Alameda County has 14 cities, the City of Livermore was not included as a participant in Measure WW because it was not annexed to East Bay Regional Park District until 1993 and, therefore, was not part of Measure AA, of which Measure WW was an extension.*

Measure WW is a case study of a special purpose capital bond that required many layers of financial planning to present a responsible proposal. The District encompasses two counties, 33 cities*, and many unincorporated communities. The goal was to achieve buy-in from each community both at the policy level and the grass-roots level. With a two-thirds requirement for passage, a very few unhappy communities could sink WW long before Election Day.

The original Measure AA the District sought to extend was developed in 1988 in recognition of this reality. It was crafted to divide the bond

revenues from the tax rate into pots for three general purposes: 75 percent for Park District projects (3/4 for land acquisition and protection, 1/4 for recreational and park development), and 25 percent for local park and recreation projects. To ensure local control, communities would submit grant applications for funding from their allocation, which was based on census population. The per capita distribution formula served the communities, public, and District well, and was essentially repeated for WW with the appropriate adjustments for population shifts.

Assistant General Manager Dave Collins, District finance and administrative officer, worked early with research pollster Manross, the Board, the General Manager and staff, and others to test options and arrive at a target amount of money to seek. They determined that \$500 million over approximately 20 years was the optimal figure. This amount represented a replication of the \$225 million approved through Measure AA in 1988, adjusted for inflation to provide roughly equal buying power. Though many advocates sought a larger amount, this concept prevailed, supported by survey research that indicated a higher probability of success. The initial list of projects was winnowed down to \$500 million, focusing on highest priority needs in the community. Quite simply, it made political and practical sense to keep the cost to taxpayers at existing levels as the General Manager had directed.

The District spent two years compiling the WW project list, including draft project descriptions and allocation estimates, visiting every part of the two counties to hold a variety of public forums for input and working with all stakeholders to develop consensus on a fair and equitable allocation plan.

“We tried to avoid the two absolute ends of the spectrum,” Collins explains. “We didn’t want to approach the public looking vague – we obviously have expert information on many of the needs and opportunities to grow and improve the District and East Bay recreation we could provide. Yet we didn’t want to just hit them with a list in which they felt no ownership. Essentially, we avoided both ‘What should we do with the money?’ and ‘Here is the list.’ Instead, we gave them a specific program and asked ‘This is what we heard from you. Did we get it right?’ A lot of it we had gotten right; other times, the community response significantly improved the draft list. Showing that we listened and made changes also built credibility and trust.”

We will explore the myriad arms of the community input aspect of Measure WW in other sections of this report. For now, our focus is on the community effort to help develop the specific project list that would be widely distributed and otherwise made available for public scrutiny long before the election.

The evolving plan was also placed regularly on the Board of Directors' agenda and was a topic in five Board workshops each year to get Directors' input and direction. "We made very sure that we were hearing what each of seven board members felt was a priority in his or her ward. The process also helped build the Board as a team behind the measure, welding them together, preventing factions, building common understandings, finding consensus, and fostering a climate of constructive participation even as we faced something as dauntingly complex as a ballot measure," Collins added. "We worked for consensus on the big decisions first: total amount, distribution formula, tax rate, date of election, etc., and over time worked down to finer levels of detail."

Like most political policy boards, the District's seven board members came from very diverse communities and perspectives. The District enjoys an advantage in that the common bond among them usually is a shared passion for parks and open space that are well maintained and accessible to the public. They also tend to serve on the Board for many terms with few exceptions, strengthening them as a team and fostering a high degree of expertise on the Board.

"That does not happen by accident," General Manager Pat O'Brien stresses. "You encourage this kind of stellar Board by working closely with them over the years, by including them as partners in the work, and keeping them informed every step of the way. And that cannot begin six months before an election – *it must be the culture of the successful public agency.*" (Emphasis added.)

Collins tracked all the project proposals and updates, the estimated costs, and various iterations of how to fairly allocate the anticipated funds to overlay with the priorities of the dozens of communities, the limitations of revenues, community and board input, various special-interest stakeholders (including a variety of environmental groups who actively engage in park issues), and staff expertise. He worked and reworked the list to find equity among the diverse communities and Board members' seven wards of representation.

“I developed a monster spreadsheet that I carried on my laptop to take to all these meetings to answer questions, take notes on recommendations, project on the wall when necessary, and to create specialized project sortings for geographical areas or interest groups,” he remembers. “All told, over those two years, I created more than 85 versions of that spreadsheet before we distilled it to the final, adopted project plan.” (Excerpts from one version of the spreadsheet are attached as Appendix 3b to provide some general sense of the level of detail developed, tracked, retained, analyzed, and balanced to complete the project plan.)

At the same time, Collins developed a finance schedule and project structure. The measure if approved would authorize sale of \$500 million in bonds, which met the threshold polling suggested taxpayers would support, to repay bonds issued in phases of \$50 million every two years over approximately 20 years. Such a schedule also meant developing scenarios to adjust to the downturn in property values in the recession (or other possible economic downturns over the life of the measure), as well as changes in census, consumer price index increases, and other variables. All had to be planned to honor the commitment to a \$10 per \$100,000 assessed valuation per household. (The first \$80 million in bonds was successfully marketed in mid-2009 with interest rates as low as the lowest available in 35 years, a great deal for taxpayers.)

Finally, the overall District effort was detailed with standard project management software used commonly in major construction projects. This continually updated schedule helped track tasks, due dates, critical path elements, and staff assignments, and reflected the relationships among a large team working together for the overall effort.

“Attention to detail is important, and there are a lot of details in an effort like this,” Collins says. “Forgetting critical details can cost the agency an election either at the polls, or afterwards through legal challenges.”

This language in this bond measure raised a particular, financially-related challenge. Specifically, language written as an ironclad promise, or guarantee, to never exceed a specific tax rate (rather than just the total amount of the bond) in effect could be construed to limit an agency’s ability to raise sufficient revenues to repay the bonds. This is the type of concern that can chase away the best bond firms and lenders. Collins worked with bond counsel to craft language that would provide the assurances both lenders

Tips and Guidelines

1. Developing a sound plan requires intelligence that captures public opinion and input. Polls, surveys, and other methods of gathering this information are vital to ensure your plan responds to public (voters’) priorities.
2. Start with a well-grounded team with complementary skills, a deep level of experience with the organization and community, and the ability to work well together as personalities. Make sure someone is highly organized and possesses the technical capability to capture the process as it evolves in a way that translates for many audiences.
3. Make sure the evolving plan’s format is interactive, allowing you to try variations or amendments quickly without re-inventing the document.
4. Roll up your sleeves and get out in the community. You don’t get a strong plan if you haven’t visited the community and learned its character and the actual services you may be providing at the grassroots level. The best spending plan is one that has been thoroughly and publicly vetted.
5. Develop a plan that is specific, but not cast in concrete. Give the public specific information and an opportunity to make it better.
6. Use accurate information and reliable estimates. There is no substitute for credibility of the information – now, or later when you try to implement the measure’s promises – **and be prepared to show your work!**
7. Be patient! There are few shortcuts to a solid plan. Remember that there were 85 iterations of Measure WW’s plan before the final was adopted.

and taxpayers would require, yet also meet the legal requirements being scrupulously monitored by District Counsel Ted Radosevich and the General Manager’s Oversight Committee.

As he undertook these macro-level issues, Collins also developed the criteria for the local project grant funding and a process for administering it over the life of the measure.

A final critical point on the financial front: Local elections can be outrageously expensive, as your county will charge you its election costs. The District’s election costs as billed by the counties for this two-county measure was in excess of \$2 million, which by law is borne by the District’s general fund – win or lose. “We planned ahead for several years, building sufficient funding in our budget to pay the two counties for this election. Even so, we underestimated the final bill. We ultimately retained an outside specialist to review the matter and help us challenge and renegotiate some of the charges,” Collins explains.

Collins was one partner of a three-man team that pulled together the financing, the potential for land acquisition, and the specific park development projects that had to fit together

to create a project plan for spending the proceeds of the extension. Assistant General Manager Bob Doyle oversees land planning and acquisition for the District and Mike Anderson is Assistant General Manager for Development, Planning and Stewardship. The three were partners on the long road to completing the Measure WW project list.

“Bob had a really strong understanding and foresight about where land might become available, who might be close to selling their property, what it might support,” explains Anderson. “Dave has a clear understanding of what is financially viable, how to balance the relative values and interests involved, and how to structure the polling and organize the process. And my piece was to try to overlay the two, look at the polls and all the public input we gathered in community efforts, and figure out what kind of park construction we could plug in to serve each community, where we had access and utilities and support, and how to choose projects in a way that provided equity in all communities.”

Together, the three created version after version after version of a plan, dividing the jurisdiction into six logical areas to ensure equitable distribution, and then capturing it in Collins’ monster spreadsheet. The final project plan included 67 projects throughout the District in phases over the 20 years of the measure, plus the potential for hundreds of smaller local recreation grants in every community the District serves.

To Go or Not to Go

As an agency completes the considerable work to draft a measure and create a detailed plan, its leaders must decide whether to go forward, officially submitting the measure to the county Registrar of Voters months prior to election. A number of factors will have helped form a recommendation and must be considered. They vary greatly with each issue and community, and there is no magic number of factors or standard checklist that must be met. But all help inform the final decision. Questions to ask of yourselves include:

Q: How many and what other measures are expected on the ballot? Are you asking for a tax or assessment while other agencies are doing the same?

Q: Do early polls show support for your vision?

Q: Does a majority of your leadership support the measure and have you tried to satisfy those who are less supportive?

Q: Do you want to place this on a general or special election ballot? Will the turnout favor your item?

Q: Are the most prominent issues expected on the ballot compatible with the voters you hope to reach and your issue?

Q: Have you gone to the well recently, or too often? Have you tried this measure before and failed, and if so, have you waited long enough and/or addressed the factors that help doom the earlier effort? Or, have circumstances changed?

Q: Do you see the outside interest to feel confident an independent campaign will emerge and fight for your cause? Conversely, have you done the community work and planning to satisfy as many would-be opponents as possible?

Q: Do you have the resources to pay election-related expenses, and is your policy body willing to allocate those resources? Do you have the staff time, skill, and organizational consensus necessary for several years of preparation?

Part Two: Assembling a Team



The Case for Outside Expertise

Elections and election politics are not a project for the do-it-yourselfer. Even armed with a well thought-out measure, a keen sense of public opinion, and an outside campaign structure, presenting a successful ballot measure requires specialized expertise.

Among the most common (and costly) mistakes many local agencies make when putting forth a ballot measure is to shortchange themselves on expertise. It is ironic that public servants pride themselves on being non-political and therefore, it follows, have little expertise in the field of politics, yet somehow believe they can effectively present a winning measure to their electorate without the help of experts to present a viable ballot measure in a political environment.

This delusion is further fueled by an unwarranted belief that if the measure is “the right cause,” the voters will recognize and embrace it. This pattern is regularly repeated among local agencies throughout California and somewhat baffling in view of the equally common belief in local government circles that the public doesn’t understand or appreciate their services. Considering the large number of ballot measure losses each election cycle, it seems that some local agencies suffer from the classic syndrome of continuing to do the same wrong-headed thing while expecting different results. In this section, we will explore a few of the vital forms of expertise that can benefit your effort to move forward with a ballot measure.

Keeping a Pulse on the Public: Pollsters

Conducting voter opinion polls can be time consuming, expensive, even distasteful to some. It is also essential to putting forward a winning ballot measure that appeals to the public’s priorities and, therefore, inclination to support you in the voting booth. Dr. G. Gary Manross, CEO of Strategy Research Institute has provided polling services for the East Bay Regional Park District for many years and election cycles. In his experience with District ballot measures since the 1980s, Manross has conducted polling

for many Park District measures, beginning with Measure AA in 1988. All but two passed. In both cases where measures failed, he predicted the loss.

“It’s really quite simple,” Manross says of the decision whether to conduct polls. “Either you want to make an informed decision regarding a ballot measure, or you don’t. Polling voters allows us to find out what people want from their government, and how much they are willing to pay for it.” It is crucial that an agency sponsoring a ballot measure goes into it armed with reliable information and updates that information along the way.

Polling at critical stages provides valuable information to help draft, amend as needed, and measure the success of the campaign strategy and your own outreach efforts in persuading voters to support the measure at critical junctures along the way. Manross also employs a “go/no-go” survey model that can provide an agency a sort of exit ramp if it appears the agency is pursuing a losing cause. Public opinion polls may cost money; failing to conduct them while investing staff work into an uninformed ballot measure effort can be far more expensive. And, it can damage the potential to put another measure forward at a later date.

Polling makes good economic sense as well. Out-of-pocket election expenses of more than \$2 million, win or lose (not including staff time, the cost of public information), mean that going forward with a ballot measure is a major taxpayer expense that requires strong justification and the highest probability of success, which polling can provide. In the case of Measure WW, polling costs represented less than 5 percent of out-of-pocket District expenses to prepare for the election.

Getting the most out of money spent on polls requires timing and the right pollster. Much can depend on the type of ballot measure, the community, and the length of start-up time. In the case of Measure WW, thought likely to go to the voters in November 2008, a recap of the polls conducted may help guide others:

- **January 2007:** Early polling to gauge public reaction to very specific issue questions. Results showed 76.5 percent of likely voters support continuing the tax approved in 1988 as Measure AA and due to run out of funds. But poll results showed greater support when the wording asked to “extend” the tax, rather than “continue” it. The same poll made it clear the public would not support an increase in the tax rate although an increase would have allowed the District to further achieve its goals over the life

- of the measure. The poll's results also met the criteria set for the "go/no-go" model, establishing a high degree of confidence that a well-run campaign would succeed in November.
- **January 2008:** Second poll as election year dawned. Economy began slipping and support dropped to 72 percent. Still met the thresholds set in the "go/no-go" model.
 - **June 2008:** Mid-year poll included actual draft measure language and showed support climbing slightly again to 73.5 percent despite further sagging in the economy. Public education and outreach by the District was in motion. The outside campaign committee was raising money and becoming active. Results provided confidence that the actual draft language of the measure was responsive to public priorities.
 - **November 2008:** An exit poll was conducted, providing insight regarding the factors that helped Measure WW and voter preferences that may help the District plan services or draft future ballot measures, should that be necessary.

The District has conducted these and other surveys and polls at District expense unrelated to a specific election as part of the continuing efforts to keep a finger on the public pulse and gauge customer satisfaction. Embedded in the data from one such poll done during the Measure WW effort was a finding that voters in one

Tips and Guidelines

1. Accept that polls are crucial. They will provide road markers to support your vision, provide guidance in shaping your measure's details and target resident groups that need attention, or offer a reality check on your perspective.
2. Invest in a professional, experienced with customer satisfaction tools and with local ballot measures.
3. Listen to the polls and don't be afraid to change course as appropriate to reflect the priorities of the public.
4. Commission polls at critical points in the process: at conception of the idea, before moving to place a measure on the ballot, and along the process to measure the results of your work.
5. If respected pollsters conclude your measure will not meet with voter support, consider carefully before investing further time and money.
6. Conduct exit poll to inform future services, ballot measures.

urban community where support was not as strong as expected placed a high priority on creek restoration. The project plan was adjusted to include more creek restoration and public affairs went to work headlining that aspect of the plan. Measure WW ultimately won in that part of the community. It was a pivotal point in building a WW strategy that may not have been identified were it not for the polling ordered by the District.

Based on the plans developed and polls showing more than 70 percent support, the Board of Directors voted to submit the measure to the voters in November's General Election. The District paid for the polling services to gather valuable information from the public about what they wanted from their regional park system, and they listened to those polls. Had the results been different, the measure likely would not have been put on the ballot.

Your Story Won't Tell Itself!

The best-crafted ballot measure for the most righteous of causes stands a strong likelihood of failing if you do not tell your story plainly, loudly, and continuously to the voters. Some agencies handicap themselves at the onset by shortchanging the effort to communicate the issues to the public and their stakeholders. First, many public entities view public affairs and community relations activities as "extras," dedicating from zero to very few resources to such functions and reducing that commitment in difficult fiscal times. It is a striking contrast to the private sector, where companies often rely on public affairs and public relations activities to push them through the down-cycles in business. Second, public agencies often compound this failing by assuming that the cause they are putting forward is good, and therefore will be supported by voters. A false perception that any public outreach violates strict State laws further limits their potential in presenting ballot measures.

These attitudes can be debilitating when an election is at stake. Further, they neglect the fundamental right and responsibility of government to keep the public informed and educated about serious matters of public policy. A public agency is obligated to communicate with the public extensively when it is asking for the voters' authority for a special tax to fund a capital program or service.

If there is one area of activity that permeated every aspect of the effort to pass Measure WW and is credited by virtually everyone connected

with the measure as integral in WW’s success, it is the public education and information program managed by the Public Affairs Division of the District. Those from other arms of the WW project, both among staff and from the outside campaign, return repeatedly to the reality that this was not a short-term communications plan that coincided with the months of the campaign, but a long-term vision and commitment that began several years before election and involved a wide array of collateral materials, appearances, news media strategies, community relations activities, and ongoing “branding” efforts. In the case of the East Bay Regional Park District, such activities are aggressively pursued whether or not there is a ballot measure to explain. For WW, Public Affairs developed, implemented, and adjusted an evolving communications strategy that began two to three years ahead of the November 2008 election based on the high likelihood that the Board of Directors would move to extend the highly successful capital bond act first approved in 1988 as Measure AA.

Planning and Using the Plan

District Public Affairs has continually set goals and objectives for its work and strategies and a timeline to achieve them. The Division also plans at a project level, developing specific communications plans for such high profile issues as the 75th Anniversary year, the grazing plans within the parks, development of major parklands, significant environmental issues, and ballot measures. The strategic communications plan that served Measure WW features more than a dozen iterations and updates – each one emerging from a constant set of principles, messages, and themes to serve the project, and featuring a wide range of strategies that could be adjusted as events warrant a change in direction.

The plan’s format will vary according to an agency’s style or preferences – there is no one way to compile the plan (see appendix for a sample iteration of the Measure WW communications plan). But all effective communications plans share some common elements: an agreed-upon set of key themes or messages, a list of identified target audiences, a set of strategies to reach those audiences using available resources, and a timeline. Obviously, it is also important to monitor progress, updating the status of the plan and reassessing for possible changes in course or strategy.

The Park District has long recognized that the effort to develop a few key messages to serve an issue is the foundation of a communications plan that will effectively connect with the public and the specific audiences it hopes

to reach. For example, here are a few of the key messages that were constant refrains along the course of the Measure WW effort and were echoed in every communication strategy and to every audience:

- Measure WW would extend a successful, existing measure at no increase in tax rate;
- It would allow the District to continue protecting open space and parklands, and developing local parks projects in every community;
- The District delivered on its promises over the two decades of Measure AA (WW's predecessor), completing hundreds of park projects and leveraging every dollar into another dollar of funding from other sources.

Agencies seeking the best chance for success at the polls plan early and provide continuous public outreach. At EBRPD, Public Affairs was working its plan toward Measure WW in 2005 and 2006, long before the measure had a place on the ballot or even a name. "We were rolling out updated information on all we had accomplished using Measure AA since 1988," Community Relations Manager Carol Johnson says. "It was consistent with our continuing branding efforts, which, in turn, set the stage if the Board decided to go for the extension.

"We were working on improving our website, attending breakfasts, events, and mixers in the community, we did presentations, customer surveys, and made sure our messages were consistent everywhere we went."

Assistant General Manager for Public Affairs Rosemary Cameron recalls that the District began the specific outreach for Measure WW immediately after obtaining voter approval for a new special excise parcel tax in 2004 to finance operations. "We just never let up – we kept the same heartbeat going from the day the 2004 election was over, beginning with more polling and satisfaction surveys among park users."

By 2007, the Division was implementing a sort of pre-WW communications plan to step up reports to the public about the District's accomplishments using the proceeds from Measure AA. That outreach continued a theme they had been shouting virtually since winning AA in 1988. The 2007 plan increased strategies to serve that theme to prepare the ground for the 2008 election.

The plan to celebrate the 20th anniversary of AA began a year earlier, in 2007. A centerpiece of the celebration was a series of community leadership breakfasts hosted by Board members in their respective wards focused on the accomplishments of AA and the District's future. Other activities included dozens of news interviews, community events, speakers' appearances, website materials, and discussions with interest groups in the community.

Also in 2007, the District's contract pollster, Dr. G. Gary Manross, conducted the first community survey of the general public using the random telephone method, rather than polling only registered voters as traditionally done by the District. This survey, while not geared towards voters' attitudes on a particular funding measure, nonetheless provided valuable insight into general public knowledge of the Park District, its parklands and programs, and how they get information about the District. The findings would help Public Affairs shape its plan and strategies as the 2008 General Election approached.

This kind of full-court press does not come cheap, as so many in local governments hope it will when they decide to take a ballot measure to the voters. The production of special public education materials was the most significant additional cost to the Public Affairs budget. The Board allocated \$150,000 for brochures and other materials that would reach more than 2 million residents in the two-county district during 2008. The District also paid for pollster Manross to conduct public opinion polls and customer satisfaction surveys, which were closely watched to guide continuous improvement in customer service, and help plan for the parks' future. But the information gleaned was also valuable in helping shape Measure WW, its project list, and the public affairs strategy to take it forward.

While these are sizeable investments, most of the strategies contained in the communications plan and discussed here are strategies that required the expense of staff time, not District dollars.

What's in a Brand?

As impressive as the above may seem to local agencies with fewer resources committed to public affairs programs and services, it is the tip of the iceberg. For the Park District, it is a two-decade commitment to branding – establishing its identity and building trust within the community



on a continual basis. This was both natural and possible for the District due to the long commitment to public affairs at the agency.

“When I first came here, there was a limited public information effort, but no marketing strategy, no significant public outreach or publications telling the District’s story or appealing to the public to use the parks except in the effort to pass Measure AA,” recalls General Manager Pat O’Brien. “We provided services, but we needed outreach and access, and a communications system so the public would know of those services and recognize us anywhere. I saw a direct link between those things and knew public affairs activities were critical to that linkage.”

Indeed, then-General Manager Dick Trudeau formed the public information office in 1964, establishing what has been a 45-year commitment to outreach. Prior to his appointment as General Manager, Trudeau himself had managed public affairs for the District at the direction of then General Manager William Penn Mott.

But it has been O’Brien who grew the office into a far-reaching and widely respected system of community relations and public affairs. Today, a staff of 17 full-time positions manage public information, community relations, ongoing and special publications, signage in the parks, graphics needs, and staff a community foundation to support the parks (three positions). Many were deeply involved in the drive to educate the public and take Measure WW into the community – some devoting a significant portion of their work time to the effort.

In addition, the Public Affairs Division put into play its volunteers, community supporters, and personal services contracts to supplement the staff and focus on specialized tasks. There was plenty for everyone to do.

As impressive as the District’s commitment to public affairs is, it cannot be effective unless the organization uses it wisely, according to Cameron, whose position as an Assistant General Manager reflects the organization’s value of Public Affairs. “Leadership has always embraced (public affairs) as a vital part of the team, and viewed me as an equal among the District’s executive team. And we deliver.”

Cameron notes that pursuing a ballot measure requires regular, close interaction with the District’s leadership. “I can’t imagine how my team could carry out the right message and strategies if I hadn’t been at the table

with the General Manager’s WW Oversight Committee for almost two years. An agency that waits to involve Public Affairs until an important project gets to the final stages is short-sighted.”

This interaction allowed the Public Affairs Division to develop a long-term plan. “We had a plan from early on and we followed it,” Cameron recalls. “We delivered on the strategies we planned. If we forgot something, we adjusted and switched or added strategies, such as when we realized that the Chambers of Commerce in the cities are a valuable community audience we were neglecting. We added in an ambitious speakers’ bureau schedule and took our story to dozens of Chamber meetings in the months preceding the election.”

All told, Public Affairs coordinated hundreds of appearances to reach every constituency during 2007 and 2008, developing presentations and materials, staffing many of those appearances themselves, and supporting District elected and appointed leadership as they attended many more.

Public Affairs also made sure that the District website had a dedicated space for Measure WW news. Electronic media, including social media sites, now offer more ways than ever to reach residents essentially free of charge, offering the opportunity to post the project plans and announcements of all forums at which the public can meet firsthand those who are developing the measure’s spending plan. Cameron reminds agencies that online they can easily add information fact sheets or brochures, columns or letters from the agency leader, and key messages and goals for the measure – everything educational that does not advocate.

While it is difficult to track hits to all online sources of news about Measure WW, the East Bay Regional Park District reports more than 800,000 page views of its website over the two months prior to Election Day 2008, and through the end of November 2008. They do know that thousands of viewers took menu choices from the home page, where the most viewers enter the site, to view pages that contained news related to Measure WW.

Obviously, it is also a primary responsibility of Public Affairs to place and pitch news and feature news stories in the media, monitor news coverage and respond as needed, plan for editorial briefings and write guest articles for community newspapers and alternative media, ensure that news is available to multi-lingual media outlets, and conduct all normal media relations activities.

District Be Nimble; District Be Quick!

Adaptability and the ability to respond quickly were crucial when just three weeks prior to the election the District discovered that the Registrar of Voters in Alameda County (the majority of the jurisdiction) had left the title off the measure in the official voters' pamphlet mailed to all voters. While lawyers and leadership dropped everything to wrangle concessions from the Registrar to help mitigate the damage, Public Affairs went into overdrive, placing newspaper ads, issuing direct mail pieces, posting website information, pitching news stories and providing interviews for print and broadcast, and prepping staff leadership to make the most of the strategies available to counter the problem.

“Being nimble is as important as being flexible,” Cameron points out. “You may have done everything right for months or even years, but the totally unexpected can undo your good work if your agency cannot change course and respond quickly when crisis hits. And that response is usually going to require the full team to respond – in this case, it required political and staff leadership, in-house and outside counsel, public affairs, and others, to minimize the damage.”

Sometimes responding quickly to changes in the political landscape requires only subtle adjustments that can have profound impact. Such was the case with one slight message change inspired by the dramatic drop in the economy in the month prior to Election Day 2008. As pundits began to question the advisability of asking for a tax continuance during economic free-fall, Board Member Ted Radke resurrected a theme contained in a news article a year earlier, but perfect for the new economic order. This excerpt was found in a November 2007 lead editorial in the *Contra Costa Times*, suggesting early support by that key newspaper for what would become Measure WW:

“The reason the East Bay has one of the most extensive urban park systems in the world is the long-range vision of the East Bay Regional Park District. During the Great Depression of the 1930s, park proponents had the foresight to raise money to buy huge tracts of land, much of which was then sparsely populated areas.”

This theme reflects the District's savvy at branding itself in a way that resonates with the public and adapting with specific messages consistent with that brand when an issue requires it. The Great Depression reference was echoed in the waning hours of the 2008 election season in many

forums. Ultimately, Measure WW lost very little support even as the recession deepened close to Election Day.

The public outreach effort for Measure WW had many tentacles delivering clear, consistent messages over several years and throughout every pocket of the two counties the District serves.

Cameron also stresses some core principles for success:

- The task is exponentially easier and more successful in agencies committed to a long-term public affairs component staffed by seasoned professionals who work closely with agency leadership.
- Similarly, you are halfway there if you have continuously “branded” yourselves, solidly establishing an identity and credibility in the community.
- Public affairs leadership must be at the table, participating on an equal level with other executive team members on an ongoing basis throughout the process, from conception through the “thank you” phase after the election.
- Agencies cannot hide behind campaign restrictions to avoid the responsibility of providing vital public education and information to the community. Recognize that public outreach is a right and a responsibility, as well as crucial to your success.
- Many outreach activities require using staff time and existing communications vehicles or resources – not additional money. But the budget required for educational materials or outside help to inform the public is a necessity, not a luxury.
- Your website and other electronic media tools are powerful weapons to wield and relatively free of additional cost. Use them all and update them frequently with news of the ballot measure.

Tips and Guidelines

1. Start very early. This includes a years-out commitment to branding.
2. Make a plan – then follow it.
3. Adjust the plan as needed.
4. Repeat Steps 2 and 3.
5. Keep messages simple and positive.
6. Listen to polls.
7. Leverage everything and everyone into multiple strategies, tasks, and resources.
8. Expect to work very hard.
9. Stay out of the campaign and work closely with legal staff to keep clear of the line between agency roles and the campaign.
10. Call in additional outside help if you need it.
11. Budget for collateral public education materials, surveys, consultants’ time, and expertise needed to implement your plan professionally.

Leadership

Measure WW and other measures put forth by the East Bay Regional Park District over recent decades have benefitted from a positive organizational culture. Such a culture cannot exist, of course, unless at the top of that organization resides positive staff and political leadership nurturing it.

On the staff side, the executive orchestrates the multitude of tasks necessary to present the public with a thoughtful, responsive, and credible ballot measure – dedicating as many extra hours as necessary to see the staff work is done, and done well. During the two years leading up to Measure WW's day on the ballot, General Manager Pat O'Brien also dedicated countless hours of personal time and contributed personal funds to the Campaign Committee.

O'Brien assembled and supported each step of the way a staff team to direct various non-campaign, operational efforts, including:

- Finance plan for the bond issuances;
- Citizen engagement to develop a project list for spending plan;
- Land acquisition and park development plans;
- Community sharing grant program;
- Public affairs and community education regarding the measure;
- Public opinion polls and surveys to ensure that the measure put forth responded to public priorities;
- Drafting of the measure;
- Related legal filings;
- Assembling a Measure WW Oversight Committee comprised of his executive team that worked for two years. The Oversight Committee met monthly to ensure that the staff worked to prepare a project plan and ballot measure that was done well, responded to the public's priorities, and would be matched with an accurate, responsible funding plan.

But a full-court press staff effort is not possible without the leadership and support of the policymakers. The Board of Directors were also active participants, committing time and thought that went far beyond the vote to go forward with the measure. Board Chairman Doug Siden spent 18 months heading the campaign committee, launching the front-end

planning and fundraising work almost a year before the issue was officially filed. Board members Ted Radke, Beverly Lane, and John Sutter also served on the campaign committee while other members of the seven-person board participated at various points. All seven focused in their respective wards (districts) to get endorsements, raise money, make presentations to civic groups, and inspire ground campaign participants.

Clearly, an agency headed by a unified policy board has a significant leadership advantage over an agency in which the elected officials disagree about going to the voters. This advantage can also translate into support for the staff and the resources (time and money) needed to conduct the staff activities to prepare a serious ballot measure. However, once a board of directors, board of supervisors, city council, school board, or any other local policy body has voted by majority to proceed with a ballot measure, every effort should be made to help the entire board or council's members find consensus and play an active, positive role in the campaign.

“A good example of fostering leadership in the Measure WW experience was the series of workshops Pat O’Brien and Dave Collins put together for the Board,” recalls Board member Beverly Lane. “I admit I was resistant at first, as were some other board members and even some of the staff that were involved. But it turned out those sessions were very useful and helped staff put together a plan for the proceeds that had something for every ward, and to respond to the priorities of each board member. And that resulted in buy-in from everyone on the Board.

“The workshops were also a way to keep us continuously updated and informed so we could take accurate and consistent information out to the community when we appeared on behalf of the measure.”

Lane also stresses that holding study sessions for the full Board proved extremely useful in revealing differences and generating honest discussions about those differences. “True, the sessions are posted and open to the public, but they are less formal and fewer people seem to attend, so they bring out the points of disagreement we needed to resolve in a productive way. I would advise any agency looking to put a measure on the ballot to conduct these study sessions for their elected officials.”

Board member Radke agrees. “Those sessions helped us find consensus, even if we didn’t agree on every detail of how to get to our goals,” he recalls. “The toughest disagreement was early on when we debated whether

to expand from the initial Measure AA formula, which worked so well for 20 years and voters understood. The work sessions allowed us to thrash that out and agree to stay with what worked in AA, and then work with smaller issues along the way to finalize a project plan for the bonds.”

Radke and Lane acknowledge the advantage a unified Board brings to an election process and the power of their ability as elected officials to bridge the world of the staff work and the outside campaign.

Many policymaking boards appoint a legislative committee, which can be extremely valuable in helping staff focus their preparatory work while serving as a liaison that keeps communications flowing between staff and the policy board. That committee should reflect Board diversity and can help building consensus among the policy body members.

Tips and Guidelines

1. Accept that policymakers will face disagreement among themselves, but work hard to find consensus on goals and key points early on.
2. Use your status as a bridge to enlist political support from influential leaders early, and then build on those endorsements.
3. Support staff. Recognize the hard work they will do, respect that their role must be limited to a professional one, and provide the resources and funding they need to do the job right. (Board Member Radke points to an example in which the Board increased the budget for Public Affairs Division significantly to pay for public education materials leading up to the election.)
4. Do credible polling using a professional pollster, then listen to those polls.
5. Radke advises that the organization emphasize public affairs and public information. He stresses that it is the function that threads through every aspect of the drive for a ballot measure. If you are neglecting that function now, don't expect to create a strong public outreach and citizen engagement effort for a few months in the campaign.
6. When interviewing political consultants, listen for the operative that understands the agency's strengths and existing resources, and builds on them.

Keeping Everyone in the Loop

Anyone who has worked in a large organization – especially a government agency – has experienced communications frustrations. Keeping colleagues in scattered locations and with diverse functions informed and updated, but without burying them in an avalanche of e-mails, reports, and memos, is a challenge. This becomes especially vexing during a ballot measure when reams of materials are being produced; everyone is overloaded with new responsibilities. Perhaps most problematic is that half the work is being done by an independent campaign committee and it feels as though the relationship is such that one party is working from a land for which the other party has no passport.

Each part of the effort can exercise common-sense techniques for keeping their team informed. As for communication between the staff and campaign camps, those separate efforts cannot be nor are they intended to be joined. But there are bridges that can occur naturally.

Proven tactics, formal and informal, can help an agency keep its staff working in concert toward a common goal of presenting a well-reasoned, planned, and responsive ballot measure for the voters' consideration.

Tips and Guidelines

1. Establish an oversight team or committee of executive staff. Meet regularly for updates and developments on all fronts. Follow a regular agenda and routine to make those meetings most productive and efficient. For more than two years leading to Measure WW on the November ballot, the General Manager's Oversight Committee of executive staff representatives met monthly to monitor progress on the project plan, financial component, public affairs and community relations effort, legal aspects and filings, and other tasks related to WW.
2. Keep your living documents such as the project plan in an interactive, online format to allow the most up-to-date versions and information to be available to everyone.
3. Use the website to post latest developments and information, both internally and on public pages as appropriate.
4. Provide monthly updates on ballot measure staff work to the policy board.
5. Hold an appropriate series of work sessions or study sessions with the policy board to further their input and confront any disputes or inequities they may perceive in the plan. Keep policymakers involved.
6. Maintain a collection bank of materials issued both by the agency and any outside campaign committee as soon as available. Review regularly to keep abreast of activities and to detect any problems or inconsistencies.
7. Embrace and involve recent retirees, or other agency-savvy people who volunteer with the campaign committee and may also be useful volunteers to the staff effort, bringing with them an inside understanding of the campaign's direction.
8. On your own time, try to keep a close eye on the campaign's website and outreach efforts.
9. If your agency hires a pollster to do non-campaign, customer satisfaction, and public opinion polling, he or she may also as a matter of choice visit the campaign as a resource and to gather useful information. That person can be a valuable bridge between staff and the campaign.
10. Keep employees informed with postings on the website, intra-net, memos – even brown bag informational lunches, if that works in your organization.
11. Make sure the staff and campaign provide courtesy information as appropriate. For example, sharing a courtesy copy of such items as brochures, speaking schedules, and the like can avoid duplicating efforts or working at cross purposes by issuing inconsistent messages.

Part Three:

The Emergence of the Outside Campaign



The Campaign Committee

Building the Team; Getting Started

The campaign committee obviously must operate at a long arm's length from the agency and its staff putting forth a ballot measure. It is a separation that must be scrupulously adhered to and understood by everyone connected with the measure.

If your agency has advocacy groups, special interest groups, and other organized support or natural political allies, the core of your campaign committee is likely to emerge from those sources. For example: police reserve associations will work hard for a public safety measure, many libraries can rely on a Friends of the Library group, and in the case of Measure WW, the Regional Parks Foundation brings highly successful community leaders to service on behalf of the parks. Labor organizations can be a major source of support, and were in the case of Measure WW.

Your elected policy board of directors, council members, or supervisors may be the conduit that approaches and recruits such leaders to the campaign. Some employees and union representatives may also choose to give off-duty hours as campaign volunteers but should never be asked by management to do so. In other words, while the professional organization and the campaign are separate operations as required by law, they share a common purpose that naturally bridges the campaign and staff efforts in a complementary way while maintaining a safe and appropriate separation between the two.

While every campaign committee in each community evolves from different roots, we will provide information into the formation and roles of a typical committee and its application in the case of Measure WW.

Your campaign committee will include (but may not be limited to) members in several key roles:

- Chair (and possibly co-chair).
- Finance chair (or subcommittee).
- Treasurer.
- Endorsement chair (or subcommittee).

The committee will direct the major activities of any campaign that cannot be conducted by professional staff within the agency:

- Hire and direct political consultant(s).
- Raise money.
- Hire and direct the professional fundraiser(s).
- Document donations and file required financial and campaign reports.
- Pay bills.
- Seek endorsements.
- Produce and distribute mass mailings, emails, pamphlets, other campaign materials (usually accomplished by hired political consultants).
- Coordinate with allied organizations (e.g., The Sierra Club, Save Mt. Diablo, and others with interest in Measure WW).
- Organize and coordinate “on the ground” efforts, i.e.: precinct walks, telephone banks, get-out-the-vote activities, etc.
- Conduct polls and research activities.

EBRPD Board of Directors member Doug Siden served as chairperson of the Campaign for Measure WW Committee and remembers the formative steps putting the Committee into action. Siden volunteered in early 2007 to serve as chairperson and was meeting with a core group of like-minded supporters soon thereafter. Fellow Board members Beverly Lane and Ted Radke also attended that first, formative meeting of the Campaign Committee, held in June 2007. Siden remembers early tasks on that agenda’s checklist:

- Discussed committee membership, focusing on criteria that would best ensure success: campaign experience, close community ties from diverse areas, a balance of focuses (e.g., both business and environmental activists were important to a regional parks measure), and a complement of skills.
- Formed a subcommittee to interview and recommend political consultants.
- Selected a professional fundraiser, developed contract, set fundraising timelines and goals.
- Discussed early fundraising strategies, contracted with a fundraiser.
- Identified a treasurer.
- Set earliest priorities and strategies; assigned roles and responsibilities.

- Began developing an endorsement target list and strategy, which would allow early fundraising.
- Delegated member to develop endorsement card.
- Chose name for the campaign, “Yes on Parks,” and assigned member to file for campaign number.

When seeking the right team, organizations may find that they have precious human resources in the form of talented and available retirees. Jerry Kent, a recently retired Assistant General Manager for EBRPD, proved the point in the campaign for WW. While Kent had retired a few years earlier, his passion for the District he served for decades was as active as ever, and he channeled it into the campaign. He filled several roles but focused on two critical tasks for which he may have been uniquely qualified: volunteering to work with staff in pulling together the communities within the District to develop a project list; and serving as a core member of the Campaign Committee, chairing the endorsement effort.

Retirees like Kent and others offer significant benefits and advantages to a campaign. They have agency expertise and historical perspective. They may have even worked on ballot measures in the past (as was the case with Kent). They may be retired, but continue to be lured by the agency or its mission and likely miss the connections and involvement in the community. They often are happy to reignite that involvement on a temporary basis. They have deep contacts in the community with those who may be campaign supporters and opponents, and the ability to approach them. Perhaps equally valuable is their ability to work on a volunteer basis with staff as needed while simultaneously working with the campaign without legal conflict. In effect, they may be a vital bridge between the professional and the political effort that helps organically promote a more consistent, accurate, and unified approach to the measure.

When the Campaign Committee began to tackle its tasks, they also set in motion a principle and a meeting strategy to balance the need for updates and strategic brainstorming and desire to avoid a culture devoted to meetings. In order to provide the most efficient yet effective stewardship of the campaign, they kept Committee membership to 22, of which about a dozen attended most meetings as their tasks were front and center. The Committee met monthly for 15 to 16 months, beginning at formation and continuing through Election Day.

“We also established routines right up front to make sure we kept everyone in the loop as much as possible,” Siden says.

In addition, a few District staff leaders like O’Brien, Collins, and Doyle volunteered significant personal time so they could attend as resources to the Committee. Stakeholder-group representatives, such as the Sierra Club, Save Mt. Diablo, and others either served on the Committee or served as resources to the Committee. Representatives of the two named organizations were also members of the Committee and tireless workers. Of course, the political consultants and fundraiser were frequent attendees at the Committee meetings and worked at the Committee’s direction.

Financing the Campaign

Financing a local ballot measure campaign is no small task given the often contentious nature of the modern political arena, the disenchantment of the public with taxation and politics, and the high cost of running a campaign, particularly in a higher-population environment. Many agencies seek a tax or bond measure during difficult fiscal times and a struggling economy, and therefore, campaigns are appealing to donors when usual donors may have little money to give.

The financing structure of a typical campaign has several parts. Measure WW was a textbook example of the goal-driven and effective financial operation. It was comprised of three major units of a focused team under the auspices of the independent campaign, working from a strategic plan:

- Finance Subcommittee with strong finance chairperson(s).
- Treasurer.
- Professional contract fundraiser.

Each unit played a distinct role in the financial element of Measure WW campaign. Each member of the team within those units held a clearly-defined responsibility and worked closely with the team for the effort. A campaign committee for a ballot measure effort should identify and put to work the finance team very early in the process. This team was in place and raising money as early as the spring of 2007 for a measure on the November 4, 2008 ballot.

Obviously, the funds needed to run a successful campaign are different in communities of different size, media makeup, cost of living, and nature of the ballot measure. The East Bay Regional Park District encompasses two urban counties in Alameda and Contra Costa counties. The cost of living is high and the population exceeds 2 million. The regional parks are generally perceived in this politically progressive community as a positive cause and the District is fortunate to serve an inherently popular issue. With this snapshot in mind, the Campaign Finance Subcommittee set a fundraising goal for Measure WW of \$400,000. Ultimately, they raised approximately \$650,000.

Campaign Finance Subcommittee

The Campaign Committee for Measure WW selected six to eight members for the Finance Subcommittee, led by co-chairs Eric Zell and Jim Summers. Zell is principal of his own campaign consulting firm, Zell and Associates, which has deep ties in the Contra Costa County portion of the Park District, but took on the Measure WW finance role as a volunteer. Summers was a past member of the Regional Parks Foundation whose professional life as a business leader has fostered valuable relationships within the development community and throughout Alameda County. The two were developing a fundraising strategy and putting their half a dozen committee members to work implementing it a year prior to the election.

“Frankly, that first several months before the measure was officially placed on the ballot were spent in educational activities with potential donors, or getting verbal commitments early from likely donors with vested interests,” explains Zell. “Part of that educational process is to persuade potential donors that if they are going to give money, it is better to give it early when it can have the most impact and they can get the most notice for doing so. It’s about lining up the dollars we will collect once the measure is on the ballot.”

For example, the Measure WW campaign recognized and benefited from the District’s traditional ability to be a conciliatory middleman between issues such as development and transportation in the East Bay, both of which need Parks District support at crucial times. Both communities were likely partners to support the District as it went for the extension of a property tax assessment through WW. Even the oil industry with its significant presence in Contra Costa County became an ally in WW due to its desire to have significant open space near its refineries and the Park

District's ability to provide that space. Zell notes that "you probably can't brand yourself with any better entity than the (East Bay Regional) Park District."

Tips and Guidelines

1. Select campaign committee finance members thoughtfully. Create a team that includes a broad spectrum of stakeholders. Measure WW found that 8-10 members were enough to be representative and share the load, yet not an unduly cumbersome number for practical decision-making. Include committee members who have campaign fundraising success. Find self-starters with access to various segments of the community of potential donors, and who are enthusiastic.
2. Use meetings sparingly but effectively. The Measure WW campaign finance team members met a very few times for in-depth planning meetings and by telephone a few more times. More of their time was left to the individual members to do the job.
3. In developing your fundraising strategy and identifying targets, consider partners with whom you can co-brand. Join hands to represent a mutually beneficial cause. Once you have the campaign finance committee established, work together. Brainstorm to develop a comprehensive list of targets for fundraising. Then sort out who best on the Committee to approach each target, and how to make that approach.
4. Give the members of the campaign finance committee specific and clear goals. Then turn them loose to achieve them.
5. Use a professional fundraiser. Give him or her motivation or incentive to perform well.
6. Begin early. Zell views the early pitch for donations as beginning an educational process for the fundraising frenzy later on. In many early calls, his committee members sought verbal commitments for the future.
7. Remind them of Zell's principle: "The first \$50,000 raised can have more impact than the last \$50,000 raised."

One dedicated partnership generated a powerful spark in the fundraising engine a year prior to the election. The Regional Parks Foundation, comprised of respected community and business leaders who support the regional parks, provided a \$50,000 contribution in the form of a challenge

grant. Once the Campaign Committee demonstrated it had raised an equal amount the Foundation contributed a second \$50,000.

The bottom line, according to Zell, a campaign veteran, is that you can raise the money for a good cause that has been well-branded among the voters. He believes the Regional Parks have done this as well as any public entity in Northern California. Furthermore, he believes you can raise even more money for a good cause in which people have a vested interest. Find those people, approach them appropriately, and you may begin financing your campaign. Summers adds that following this model, the fundraisers and finance people for a credible cause with credible campaign leaders can leverage donations to create more donations and otherwise support the measure.

Professional Fundraising

The Campaign Committee will contract with a professional fundraiser, commonly using the combination of a flat contract fee and a bonus incentive for exceeding the negotiated goals of the contract. Representatives first discussed the impending ballot measure with professional campaign fundraiser Laurie Earp in June, 2007, and executed a contract to begin fundraising immediately in December, 2007 – 11 months in advance of the election. The professional fundraiser’s tasks included:

- Making follow-up calls and outreach to potential donors contacted by Committee members;
- Calling and other methods of outreach to those on the target list that the Committee determined should be approached by the professional fundraiser;
- Identifying and reaching additional potential donors, as well as other strategies for fundraising, such as fundraising events.

The Measure WW Campaign Committee’s agreement with Earp was similar to previous campaigns on which she worked, combining the two to draft a compensation plan that everyone felt good about.

“We began with a fundraising goal of \$400,000, which I thought was ambitious, maybe even too ambitious,” Siden remembers. “Then we structured the contract to set a realistic, median, and optimistic goal for the purposes of compensating the fundraiser. Those goals were \$300,000,

\$500,000 and \$600,000, with graduated compensation at each level. Anything above \$400,000 earned her an incentive percentage.”

The Foundation provided significant “seed money” to launch the campaign, but Earp’s fundraising expertise was a significant factor in building a total treasury of \$651,000.

Like so many other tasks involved in a campaign, fundraising was a team effort, with Earp responsible for collecting pledges, encouraging and helping the Campaign Committee’s members as they sought contributions through their contacts, fundraising events, solicitation letters, and online donations.

“I view fundraising in concentric circles,” Earp explains. “You begin with your nearest and dearest supporters, such as contractors, vendors, partners, past donors. Your next circle includes natural supporters, advocates, and special interest groups such as the unions or environmental organizations. Then you go to like-minded individuals and members of stakeholder groups in the community.”

Earp doesn’t stress fundraiser events as much as some of her colleagues. “I plan a couple of events to kick off and get visibility in a target community where the demographics may help us,” she says. “But I don’t believe that lots of energy-consuming events are generally helpful.”

She considers each of the legally-defined contribution periods over a campaign timeline to be important, and strives to see strong contribution numbers in each one. “We began collecting donations 18 months prior to the election, which helps launch the campaign. It is also money that allows the Committee to leverage for more money and donations. But the real drive starts one year out and peaks about 6-7 months before Election Day.”

Earp warns that fundraising is not easy work, particularly in a recession as was the case in WW, and everyone must do their part. Despite her primary role, every Committee member has access to certain potential donors and must be engaged in reaching out to them.

“The Committee for Measure WW was stellar,” she says. “They spent hours with me helping compile a target list. But they also stepped up and made their calls, going through their individual lists. Bottom line: There is no way around the hard work and awkward calls.”

Some District employees choose to help with this effort on their personal time. Assistant General Manager Bob Doyle was mentioned as a senior employee who volunteered personal time making those challenging calls and meeting with high impact potential donors, yielding several significant contributions that strengthened the campaign war chest.

Minding the Treasury

Many sponsors of ballot measures and other political campaigns go awry for lack of strong fiscal oversight and careful adherence to the labyrinth of campaign laws governing every step of the effort. The campaign committee must involve a reliable and scrupulous treasurer at the very earliest planning stages – not just to manage the receipt, expenditure, and accounting of campaign funds, but to prevent missteps under the Fair Political Practices Commission’s regulations.

The campaign committee for Measure WW turned to Ken Moresi, who had served in a similar role for previous Park District measures. Prior to his first EBRPD campaign, he had never been a campaign treasurer, nor was that necessarily a requirement to do it well. Discussing his role, tasks, and approach to the job during WW, he makes it clear that patience, a sense of orderliness and respect for deadlines, and a willingness to ask questions, research answers, and ask for help from others are qualities that make this critical operation work and ensure the integrity of the campaign. Moresi maintains that even for a relatively small campaign, such as WW, he could not have done it all without his wife, Mary Moresi, serving essentially as his job-sharing partner.

The job includes two general areas of responsibility: Accounting for the campaign funds, and filing the necessary campaign financing reports with the Fair Political Practices Commission (FPPC). In addition, the campaign treasurer will likely be the person responsible for several important filings, including: forms to establish the campaign’s status applications as a 501 (3) (c) tax exempt entity, forms with the FPPC to open the treasury, and annual federal and State tax returns for the campaign. He or she will also file final tax returns after the campaign’s conclusion.

“It’s my job to keep the campaign out of trouble with the FPPC, and off the front page,” says Moresi. “I see the work as making sure we obey all the rules and keep complete records and accounting of the money we take and the money we spend.” In his two-person approach

to Measure WW, Moresi focused on the rules and banking while his wife did the recordkeeping.

While the paperwork is significant, the process is actually straightforward. Getting the campaign funded and established requires clear steps, some to be completed before the first dollar is collected and the campaign launched. For Measure WW, the Campaign Committee decided to have filings completed about one year prior to the election and significantly prior to receiving contributions. This cleared the way to focus on the campaign and not the process once the campaign was officially on. Filings by the Treasurer include:

- Open an FPPC file for the campaign using the Commission’s Form 410.
- File with the Internal Revenue Service for tax-exempt status, or 501 (3)(c).
- Complete regular and timely campaign contribution reports using FPPC Form 460 as required by the Commission. FPPC will provide a schedule of deadline dates, including instructions for using the forms, when the file is opened.
- Complete annual returns for the IRS and State Franchise Board.
- After conclusion of the campaign and debts are paid, a final tax return to the IRS and State Franchise will be required.

The treasurer’s accounting duties will include tracking all campaign contributions and expenditures by clear categories required on the FPPC regular reporting Form 460.

The FPPC can present an intimidating set of rules and procedures, but its staff can also be the Treasurer’s most important resource, Moresi found. “Use the FPPC 1-800 phone number to reach one of their advisory staff during normal work hours, and they will walk you through anything or find you the right resource,” Moresi advises. “Take careful notes during those phone conversations and try to do your homework with the FPPC manual before calling. Mine is dog-eared because I have probably read each part between 20 and 30 times over the course of one campaign. It answers many questions if you just look.”

The importance of rigid adherence to the rules and attention to these processes can’t be overstated. “The staff at the FPPC will work hard to help you do it right and keep you straight,” Moresi concludes, “but they will come down on you hard if you make stupid mistakes.”

Clearly, the first and most important step in starting the treasury is to find a treasurer who will increase the chances the job will be done completely, on time, and correctly. The treasurer needs to be a dependable and detail-oriented person, patient, willing to ask questions and do research, organized, and very good with deadlines. He or she should be fixated on scrupulous adherence to the rules and regulations to protect the integrity of the entire campaign, its members, and the public agency that placed the measure on the ballot.

Chasing Endorsements

The endorsement drive for any campaign can be viewed as developing a credibility list, one name at a time, the campaign becoming that much stronger with each added name or group. Various members of the WW Campaign Committee provided a sense of the development of the endorsement process, beginning with brainstorming sessions to simply compile names and organizations that may support the cause and persuade individual voters. It becomes a living document, subject to additions, deletions, and changing priorities as the campaign goes on.

Committee Chairperson Doug Siden and Endorsement Chairman Jerry Kent recalled the logical and common-sense approach to dividing up the work to chase hundreds of important endorsements. “The Board members took on the job of reaching out to other elected officials. They called the city council, elected supervisors in both counties, school board members, State legislators and the Congressional contingent, and any other locally elected official who helps represent the value of parks, the environment, and the importance of recreation to families,” Kent says.

Jerry Kent brought his depth and breadth of experience with the District to best advantage when he agreed to lead the endorsement drive for the Committee. His decades with the District had taken him into virtually every corner and community within the jurisdiction, developing strong ties with critical civic groups, special interest groups, and individuals.

Like Kent, some Committee members had long experience with environmental groups, local stakeholders, and community activists. Others were part of the region’s business community and focused on its leaders.

The Ground Game

Many foot soldiers from a variety of armies worked very hard to help Measure WW succeed, and no agency offering a measure should expect to win two-thirds vote without them. After the measure has been drafted, the exhaustive work to craft an implementation plan completed, the political expertise applied and polling done, and the money raised, it falls upon a network of supporters to help sell the measure in a way that staff cannot. They are an integral part of the ground game that will compile hundreds if not thousands of grassroots endorsements, visit community groups and get out the vote.

Ron Brown, executive director of Save Mt. Diablo, an environmental advocacy group in Contra Costa County dedicated to preservation of the area's environmental crown jewel, played a critical role in the Measure WW ground game. Save Mt. Diablo illustrates how a campaign can turn to like-minded partners in the community to advocate for a measure and bring needed forces to your ground game.

"It was really clear that the success of Measure WW overlaps with the goals and mission of Save Mt. Diablo," Brown explains. "We had a traditionally strong relationship with East Bay Regional Park District and it was important for our goals to do all we could to help WW pass." That included providing input in the initial process to plan a project list for spending the proceeds from bonds Measure WW would authorize. Save Mt. Diablo joined dozens of other stakeholder and special interest groups that attended the meetings and testified at a multitude of community forums during which the District sought detailed input for the project plan list.

"The second track of our effort came during the campaign," Brown adds. "We have an important environmental role in Contra Costa County and extensive relationships with city councils, the Board of Supervisors, and business and civic groups in that half of the Park District's jurisdiction. Save Mt. Diablo made countless presentations to those groups, sought endorsements, and worked at the grassroots level to get out the vote, educate our friends, distribute signs and literature – everything that goes with the ground-level effort to reach people in a good campaign." Brown himself reached down to the grassroots level, across activist citizen lines to fellow civic leaders, and above all by serving as a member of the Campaign Committee as Chairman of the Contra Costa County Campaign.

The Sierra Club is a natural ally for the Park District and causes that protect and preserve parklands, and the considerable weight of a Sierra Club partnership helped Measure WW. The Sierra Club has long been actively engaged in District issues and policies – often, as a partner; occasionally as an opponent; but always as steadfast supporter of the District’s mission and the regional parks. During the Measure WW campaign, the powerhouse environmental advocacy group brought both its political clout and its money to the drive. San Francisco Bay Chapter President Norm La Force served on the Campaign Committee. His chapter put up the money and office space for a full-time staff person to the campaign. And, with the Sierra Club came its sophisticated network of outreach. The chapter not only provided the endorsement and staff aid, it also distributed fliers at Bay Area Rapid Transit stations, community festivals, street fairs, and anywhere else that their presence could make a difference.

Save Mt. Diablo’s Ron Brown underscores the value of using partners in a good ground game for a campaign, but also summarizes what strengths help East Bay Regional Park District fulfill its staff and organizational obligations related to ballot measures well enough to gain voter approval repeatedly, and especially in 2008 with Measure WW:

“First, the District has very successfully brought parks and a wonderful trail system to the people, and the results are easy for everyone in this urban area to see, use, and enjoy. In other words, they delivered on the promise of WW’s predecessor, Measure AA, over 20 years. Second, they are led by a responsive, thoughtful Board of Directors and a very professional staff who are highly attuned to the public. And finally, when they take on a ballot measure, they do it right. They step up and do the work, involve the public in a meaningful way, and spend what they need to in order to do the staff work professionally.”

Brown says all these factors make it easy for the District’s community partners to get involved, and easy for them to persuade most audiences that Measure WW was a worthy cause. But easy sell or not, it still requires stepping up, doing the work, and making the appearances to show the customers the product.

Brown is just one very involved example of many who brought community energy into the campaign. Ground forces came from a multitude of community groups who support the District, share its goals,

or simply enjoy the parks. The Sierra Club also provided funding for a staff person to help coordinate the grassroots campaign for Measure WW.

The Cyber Ground Game

Certainly, Measure WW provided insight into a plan and process for putting forth a ballot measure by assembling the right team and using traditional and effective methods. At the District offices, where information went out to educate and inform the public about Measure WW completely separate from the campaign, staff found, like other local government agencies that placed measures on the 2008 General Election ballot, that they were exploring a brave new world of elections in which emerging tools such as Facebook, Twitter, YouTube, and blogs played increasing roles in elections. Measure WW was on the ballot at a historical point when social media was developing and its use exploding. The District and the separate campaign each used websites effectively, with the District reporting thousands of “hits” to the educational material regarding Measure WW posted on its website. The campaign also used mass emails effectively in their efforts to harness volunteer workers and raise funds.

But social media was just emerging and quickly proving its power in the 2008 presidential campaign that pitted relative newcomer on the national scene, Barack Obama, against higher-profile Senator John McCain. By Election Day, it was clear we were witnessing the unleashing of a powerful force in campaign politics.

The importance of the new media – especially social media – in today’s political process cannot be overstated. The speed with which tech tools burst onto the political landscape and redefined our notions about “grassroots” campaigning, fundraising, and public outreach was stunning.

One only need consider a few bottom lines from President Obama’s historical election in November 2008 to appreciate the role of the Internet and how it has changed elections forever. The numbers are staggering: millions of voters – especially young voters – met Obama online and followed his mass emails and blogs. Approximately 35,000 Obama for America volunteer groups formed through online tools. Three million people contributed \$500 million to the Obama campaign. The candidate had tapped into the donation potential of the masses, increasing the power of America’s small donors in an arena long dominated by the wealthiest contributors. These cyber-followers contributed to building an email list

of 13 million names (creating a ready base for a reelection campaign in 2012). All counted, more than 1,800 campaign-related YouTube videos were created. On-line supporters turned into ground workers, campaign volunteers, and donors.

The campaign also took advantage of readily available, cost-effective advertising online, reaching millions of Americans unhappy or affected by the sinking economy. It became a valuable complement to the advertising campaign in traditional media.

A minor historical footnote is telling: While the Obama campaign included at least 90 people working on new media strategies, Republican opponent Sen. John McCain had four workers devoted to new media.

All this was achieved using barely-minted tech tools. Facebook was registered as open to all in 2006, two years after being founded for college students. Applications for Facebook pages became available in early 2007 and as of this mid-2010 writing, Facebook boasted 500 million active users. Twitter's free mini-blogging service started posting its 140-character missives in 2006.

In 2009, early rumblings from the next campaign season make it clear that others have learned the lesson. The four major California gubernatorial candidates at the earliest stages of campaigning were all actively involved in social media. Representative Tom Campbell, congressman from the Silicon Valley since 1988, is a veteran campaigner dating to the pre-Internet era. Like most successful politicians in the late 20th Century, his war chest focused on mass mailings, broadcast and print ads, and getting as many news appearances and interviews as possible. Today, Campbell talks to supporters through Twitter and Facebook, emails his constituents on issues of the day, and writes hundreds of blog entries detailing his daily life, and sharing campaign stories and tidbits that help voters feel connected to him.

It is ironic that such "unseen" mass communications allow campaigns to bring voters an almost intimate sense of involvement with the issue, campaign, or candidate. Further, that intimate connection is achieved at far less cost than traditional methods of outreach. Clearly, there remains a place for the old strategies, but today's informational outreach effort must walk on both legs or risk stepping aside for campaigns that do.

Political Consultants

Measure WW shines a spotlight on the difference professionalism can make when an agency is serious about its role in presenting a ballot measure and its outside campaign committee is serious about its role in selling it. Working with the WW Campaign Committee were two political consultants experienced in East Bay political campaigns and bringing complementary skill sets to the effort. John Whitehurst's firm, Whitehurst/Mosher Campaign Strategy, focused on political strategy, mass mailings, and media outreach. Doug Linney specialized in environmental issues and focused on field work – community outreach, stakeholder groups such as various environmental organizations who follow Parks District issues, etc. The partnership occasionally overlapped in approaching tasks but also gave the campaign flexibility. For example, with two firms sharing the work, the team had choices when the campaign confronted a stakeholder situation in which one consultant had better connections or credibility with that stakeholder group.

In separate interviews, Whitehurst and Linney echo virtually the same themes when evaluating the Measure WW Campaign Committee and the East Bay Regional Park District's approach to offering ballot measures. "First, the District is experienced – they've done this a number of times," noted Linney. "Polling, writing language for a measure, packaging that measure, communicating it to the public – they have developed a real level of expertise over the years."

Linney emphasizes the long planning effort the District conducts as crucial to success. "They go out there, they get the community's input and are a familiar face at every city council, board, stakeholder group – whatever it takes to make sure they are not vulnerable to small splinter groups that if neglected can defeat a measure. And, as good as they are, they practice constant improvement. This is especially true in Public Affairs, where they've only gotten better each election I've experienced with them."

Whitehurst agreed. Both consultants stress that too many public agencies neglect to build a culture of community relations and public outreach on an ongoing basis, banking instead on hopes that a short-term push into the community in the months leading to election will build that "brand" in the community and establish credibility. Where many cities, counties, and districts may have one public information or community relations professional or a staff member who carries the function, the Parks District has for decades kept its commitment to public affairs through a diverse,

expert staff of professionals. Their role is to connect the District with the community it serves through myriad programs and outreach efforts. Whitehurst put it succinctly:

“In my opinion, the Parks District’s Public Affairs program is unrivaled in the region when it comes to putting out quality, relevant, information to its public, and doing it as many ways as it takes to be responsive and build its brand.”

Board Member Ted Radke cites this valuable asset as an insight he sought when serving on the Campaign Committee’s subcommittee to select political consultants. He recalls that during the interviews, only one political operative noted the District’s outstanding Public Affairs program and specific ways he would build on its strengths when developing a strategy, rather than try to replace it.

Following are common failures or problems political consultants report having encountered among agencies that lose ballot measures:

- Failure to build widespread support for the measure. It is critical to bring your policymakers, stakeholders, and the community together to create a high degree of consensus for the goal.

Tips and Guidelines

Political consultants agree that a few traits characterize local agencies best positioned to achieve passage of a ballot measure:

1. They establish a culture of experienced professionals. A long-tenured staff and policy board, unified behind the goals and the ballot measure, are a mighty tool.
2. They practice a continual and long-term commitment to public outreach, community relations, media relations, and other public affairs activities that “brand” the agency and constantly connect it with the public.
3. They consider an ongoing system for support and fundraising. The East Bay Regional Park District has a Foundation in place that can easily serve a limited but important role as part of the fundraising and campaign apparatus when an election approaches. This network, as well as District officials, accept the cost of going forward to election in an urban county and commit to the effort.
4. They use passion for the mission and the cause. This is aided by employees who are passionate about their work for the District, and who voluntarily step forward during off-duty times to provide expertise, time, and, sometimes, their own money to the campaign.
5. They are able to anticipate and sense the needs of leadership and the public, and are willing to work long and hard to prepare a ballot package that reflects those needs.

- Failure to accept that the staff work and preparation for a ballot measure take money, just as the outside campaign does. “Merely believing you are fighting for a just cause isn’t good enough,” Linney points out.
- Failure to listen to research. The Park District takes polls and public research seriously and views them as signposts from the people.
- Failure to plan far ahead and/or failure to involve the public each step of the way.
- Going it alone – again, usually to save money. Ballot measures are very specialized projects. Law, lack of experience, and lack of time all conspire to stop agency staff from developing that specialized skill set.

Part Four: The Intangibles



The Intangibles

This report has attempted to guide the reader through the nuts and bolts of pursuing a local ballot measure. It explores the elements and actors in an election effort, the costs, and the lessons learned by one district with a strong track record for achieving voter support. What it can't do as easily is provide an easy recipe that assesses the value or cost of intangible factors that can greatly influence the outcome of an election. But we can note a few that we recognize were either important parts of the community DNA in which the District positioned Measure WW – or could have been major obstacles to success. Some may affect your decisions and the approach you take.

Political Identity: There can be no argument that the East Bay region of Northern California is a collection of communities of diverse political identity, but that collectively, they comprise a region in which a progressive populace is highly supportive of environmental causes. The region's very political identity tends to support environmental preservation, open space, and parks. It is part of the vision that inspired the District's formation in 1934 by concerned area civic leaders, and a major factor that explains why it has grown to become the nation's largest system of urban regional parks. This political identity is obviously important to the support the District enjoys from its public. But it is also the District's track record as stewards, managing this trust that continues to earn the public's devotion to the regional parks.

Economy: It is the luck of the draw when a tax measure is placed on the ballot and the economy plunges into deep recession one month prior to Election Day. But that is what occurred just prior to the November 2008 general election. To a great extent the recession of 2008 fell under the heading of "beyond our control." Nonetheless, the Campaign Committee, staff, political leaders, and professionals quickly geared up to respond to potential concern from the public and pundits that Measure WW suffered from bad economic timing, elevating the themes of a "continuation without increase in tax rate," and the increased importance of publicly accessible recreation during economic downturns. The message harkening back to the Great Depression was echoed countless times in the 2008 election period, and provided the public with an important historical linkage to the community's core values.

Organizational Culture: Many threads make up the fabric of this organization's culture: longevity, experience, team character, quality control, staff morale, flexibility, and feeling of purpose. For example, the dedication and longevity of the General Manager, staff, and even political leadership within the East Bay Regional Park District exceed the norm in local government, with the average tenure for staff hovering at about 20 years and an elected Board that has seen only two turnovers in the past decade. Further, the District recognizes it is blessed with a mission that engenders passion among staff and attracts employees specifically drawn to a career working in parks or in park management. This is unusual in local government agencies and difficult to replicate in cities or counties where the mission is less focused, political viewpoints likely more diverse, and sometimes careers are entered for convenience rather than a passion for a particular public cause.

Political and Staff Leadership: In addition to the aspects addressed above, political leadership at the East Bay Regional Park District is characterized by a strong team identity and approach, despite very different political perspectives and wards of representation. This is fostered in part by the team character of staff, and the long tenure of general managers at the District who work hard to encourage unity of purpose and principles among the Board. Pat O'Brien had served as General Manager of the District for 20 years as he led the staff work to plan Measure WW. Perhaps more importantly, he remembers what it was to be the new General Manager when Measure AA was passed in 1988 – a significant background detail that helped inspire him to commission this report on the process of developing and putting forth a strong ballot measure. (Park District leadership is well aware that the baby-boomer retirement era will cause the greatest degree of turnover the District has every experienced and with it, the looming loss of institutional history.) This is a factor that is unfolding in many public agencies grappling with a talent drain that has been exacerbated by a wholesale funding crisis among local government agencies, which has also led to layoffs and early retirements.

Experience: The District has appealed to voters 10 times over its 75-year-history and has gained a great deal of institutional experience in posing local ballot measures. This report was commissioned in part to pass that experience and knowledge along to the next generation of District leadership, as well as public agencies who may never have been through the process of presenting a ballot measure.

Brand: This sometimes mysterious, abstract term is nonetheless crucial: For what is your agency known? How does your public perceive you? What consistent visual and emotional images do park users, taxpayers, civic leaders, employees, interest group leaders, and others have of your agency and services? How cohesively have you portrayed your brand through publications, advertising, public signage, informational materials, websites, and virtually every reflection of your organization? If you do not know the answer to this, it is time to start building a brand for yourself. It will take years to establish as a community identity, but it is a mighty weapon when the time comes to ask voters for their support.

Best-Laid Plans

No amount of detailed planning, analysis, and review can guarantee that there will not be surprises after a ballot measure passes – especially those dealing with huge sums of money that many different groups may turn to for funding. In other words, you should not be surprised to find in the years after passage that you had no idea just what you didn’t anticipate until it crops up. Measure WW and its predecessor, Measure AA, each provide a case in point – one resulting in the evolution of a better structure for distribution of the funds; the other concerning the unexpected appearance of a “creative” strategy one local non-profit wanted to use the funds to help finance a facility.

Example I: Measure AA funded hundreds of worthy park and recreation projects in dozens of communities over two decades. The crafters of AA envisioned and drafted a logical approach to distributing the funds over the years, approving distribution in phases that were tied to the schedule at which the revenues were collected and available. While it seems like a reasonable approach, the resulting flow sometimes left agencies with shovel-ready projects delaying work for years while they waited for the next phase of funding to be available based on revenue performance from AA. Other cities and agencies found themselves accruing allocations long before they had projects ready to construct.

East Bay Regional Park District staff drafting Measure WW, the extension to AA, had lived through Measure AA’s creation and 20 years of implementation, and vowed to resolve this awkward situation with WW. The solution was to create a master contract agreement with each participating locality that guarantees their total funding entitlement under

which they can submit projects for approval each year up to the “credit limit” established for them. With this knowledge in hand the District can market an appropriately-sized bond issue to fund current project applications as needed. The new system provides agencies with flexibility while allowing the District to plan cash flow efficiently.

Example 2: While it was not uncommon for a participating city or agency to apply for the local grant money for a project that involves a non-profit as an operating partner, federal law places restrictions on non-agency entities from certain “private business” uses of tax-exempt bonds. The Secretary of State’s certification stamp was barely dry on WW when one city’s Boys and Girls Club, with backing from the city’s council, approached the East Bay Regional Park District with a proposal to use WW funds to build a new facility that would be owned by the Boys and Girls Club. In the case of this example, the ownership of the asset involved had the potential to trigger serious federal sanctions.

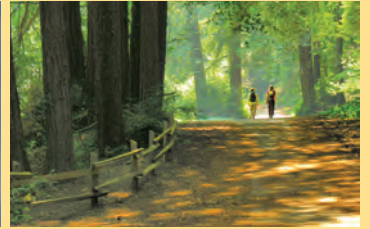
Since the District never encountered nor envisioned this specific application for funding, the language of WW and the grant guidelines did not reference such a request either to allow it or prohibit it. Financial, tax, and legal experts were engaged in a complex investigation of the language and tax laws to resolve the situation. To answer the question, the District clarified the grant guidelines’ language regarding land tenure. The city followed up by submitting the Boys and Girls Club facility for \$1,000,000 of their \$3.4 million Measure WW local per capita allocation.

CD Contents

Measure WW Booklet and Appendices

Appendices

1. Initial Public Communications – Report on Prior Bond Act Accomplishment, 1998
2. Rationale for Extension of Bond Measure, Key Messages, 2007
3. Reports on Prior Bond Act Accomplishments
4. Tracking Poll, June 2008
5. Exit Poll, November 2008
6. Measure WW Project List, Board Material
7. Measure WW Project List, Board Resolution Authorizing Acceptance
8. 2008 Election Gantt Chart (project management tool)
9. County Elections Office Elections Timetable
10. Official Measure WW Ballot Information from Voter's Pamphlet
11. Public information and Outreach Plan
12. Public Outreach Meeting Agenda, 2008
13. Public Outreach Presentations Staffing Calendar – Sample, 2008
14. Public Outreach Presentations – Final Summary, 2008
15. Measure WW Public Information Brochure (mailer), 2008
16. Measure WW Major Costs (budget planner)
17. Sample Newsclips, Editorials, Articles, Columns, 2007-2009
18. East Bay Regional Park District Ballot Measures Election Results, 1988-2008



East Bay 
Regional Park District

2950 Peralta Oaks Court
P.O. Box 5381
Oakland, CA 94605-0381
1-888-EBPARKS
www.ebparks.org