

APPENDIX I

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# **The A-Zs of Creating a Voter-Approved Children's Fund**

Making affordable, high-quality early learning and care accessible to all children in the Walla Walla Valley

# The A-Zs of Creating a Voter-Approved Children’s Fund

Securing a dedicated source of funding for programs and services for kids requires months of preparation. Follow the steps in this checklist to guide your team as you plan your effort, place your initiative on the ballot, and mobilize your supporters for election day. This checklist builds on content featured in *A Children’s Fund Campaign Manual* developed by Funding the Next Generation in collaboration with 50+1 Strategies.

## Start with a Strong Foundation

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<b>Practice collaborating on behalf of kids</b>	While the responsibility of supporting children and youth is shared among a wide range of community members, most communities lack opportunities for the adults who interact with kids to communicate or collaborate across agencies or settings. Communitywide solutions to the challenges facing children and youth require communitywide collaboration. This type of collaboration takes practice, so communities should create a table for regular collaborative work and strive to include representation of all types of community members who impact children and youth.
<b>Set communitywide goals for kids</b>	Start with your community’s goals for children. These goals should be rooted in data <i>and</i> the experiences of a wide range of community members that work with or impact children and youth, such as members of city or county departments, education leaders, hospitals, nonprofit providers, policymakers, parents, and youth themselves. One or more of the shared goals set by your community can become the focus of your campaign and your motivation for advocating for dedicated funding for kids.
<b>Define your funding needs</b>	To generate funding you’ll need to know how much funding you currently have and how much funding you need. You may want to <ul style="list-style-type: none"> <li>• use fiscal mapping to identify how much funding currently is allocated toward your community’s goals for kids and</li> <li>• use cost modeling to estimate how much funding you still need to achieve your goals for kids.</li> </ul>
<b>Identify potential supporters</b>	You’ll spend significant time building your coalition, but it helps to begin with a few organizations or stakeholders that you know are motivated to support this effort. Ask yourself—can I name at least three organizations that would be willing to contribute time, money, volunteers, or other resources to this effort?

<b>Identify a convening entity</b>	<p>Identify an organization, network, or coalition with the credibility and capacity to kick off your work. This initial lead group will convene meetings, organize partners, and fundraise for pre-campaign groundwork. This entity should be willing to donate the time of its members or staff to manage the exploratory phase of the effort and lead initial steering committee meetings. Most often, one of the following groups serves as the lead organizer:</p> <ul style="list-style-type: none"> <li>● local policymaker(s) such as a mayor, city council member, or county commissioner;</li> <li>● local intermediary(ies) such as a collective impact partnership or advocacy organization;</li> <li>● local funder(s) such as a foundation, corporate philanthropy, or United Way.</li> </ul>
<b>Chart Your Course</b>	
<b>A. Create a steering committee</b>	<p>To succeed, your effort must balance the need for input from a broad range of stakeholders with a need to make decisions quickly and efficiently. To achieve this balance you must carefully craft a small but diverse steering committee of individuals who can commit to regular learning and decision-making meetings leading up to a campaign. Be sure to include representation from a variety of groups, which may include local intermediaries, local policymakers and/or their staff, local funders, local business leaders, civic leaders, faith leaders, community organizers, providers, and families.</p>
<b>B. Determine the fund's purpose</b>	<p>Why do you want to generate funding and for what use? How you communicate the guiding purpose of your proposed fund will (1) determine whether the public supports your campaign and (2) will dictate how the funding is allocated for years to come. It is crucial to establish the guiding purpose for your fund early, using a combination of public opinion research, data on community need, and community input. In later steps you will need to translate this purpose into the legal language to establish your fund and into a simple statement about what the impact of the fund will be.</p>
<b>C. Study models of success</b>	<p>Studying successful voter-approved children's funds will help clarify your steering committee's vision for your proposed fund and can help secure buy-in from more hesitant stakeholders. Consider whether it is important for your steering committee to see models with a similar intended impact, from a similar jurisdiction, or a range. You may choose to visit locations with existing funds or assign a subcommittee of your steering committee to create a presentation on several funds. Reach out to us for help identifying the models most relevant to your effort.</p>
<b>D. Research potential public funding mechanisms</b>	<p>What funding sources can your community use to generate new revenue and dedicate it to children? You'll need to consider questions of both legal and political feasibility, including these:</p> <ul style="list-style-type: none"> <li>● What types of taxes do localities in your state have the authority to levy and dedicate to a special purpose?</li> <li>● How much will different taxes generate?</li> <li>● In which jurisdiction will you pursue revenue—your city, county, or school district?</li> <li>● What does your polling indicate voters will support?</li> </ul> <p>In order to answer these questions you likely will need the guidance of a lawyer with expertise in tax law or a public finance expert from your community.</p>

<b>E. Identify viable pathways to the ballot</b>	<p>Once you know what funding mechanism you'd like to pursue, you'll need to consider how to put that option in front of the voters as a ballot measure. There are generally two pathways: (1) placement on the ballot by elected officials or (2) placement by signature petition. Some communities can use either pathway, while others have only one option. Regardless, you'll want to identify any supportive elected officials and gauge their willingness to be part of the process of getting your measure on the ballot.</p>
<b>F. Conduct polling to inform decision-making</b>	<p>Early on in your effort a public opinion poll can give you the information you need to make crucial decisions about the funding mechanism to pursue, develop messages, and gain buy-in from key groups. Your steering committee should identify the questions you need to answer before working with a pollster to craft the survey.</p>
<b>G. Select an election date and create a timeline</b>	<p>At this point your steering committee should have the information and polling data it needs to select a funding mechanism, pathway to the ballot, and election date. Now is the time to finalize these decisions and to create a timeline of key dates and milestones.</p>
<b>Build and Engage Your Coalition</b>	
<b>H. Conduct outreach and build your lists</b>	<p>To efficiently and effectively translate your outreach efforts into real campaign contributions (whether measured in dollars, volunteer hours, or social media posts) you need to be proactive about list building. Building your lists refers to collecting the names and contact information for individuals who might support your cause. You want to develop a robust list so you can reach a large audience with email updates about the campaign, calls to action, and requests for contributions. Make sure your team members have a method for collecting this information as they conduct outreach at community events, civic group meetings, places of worship, and other locations.</p>
<b>I. Create opportunities for multiple types of engagement</b>	<p>In addition to securing votes, your outreach efforts should build your coalition by converting voters into actively engaged coalition members. As you conduct outreach, present each group of voters with a variety of opportunities to engage with the coalition at different levels. Early on in your effort some opportunities for engagement might include organizing a town hall meeting or participating in a committee. Later in the campaign you may ask coalition members to volunteer for phone banking, make a financial contribution to the campaign, or hand out yard signs.</p>

<b>J. Transition your coalition members into campaign roles</b>	<p>It's crucial to anticipate how the roles of your coalition members will change as election day approaches. Nonprofit organizations in your coalition face advocacy and lobbying limits, and may be anxious or unsure about their participation as you transition to campaign mode. While there are many helpful resources on this topic, we encourage you to engage professional legal support early on so that you can understand the opportunities ( and limitations) each organization faces. Then, as election day approaches, you can encourage coalition members to take action confidently on the commitments they made earlier in the effort.</p>
<b>Craft Your Ballot Measure</b>	
<b>K. Plan your fund's infrastructure for administration, oversight, and spending</b>	<p>Whether or not the public trusts that the fund will make its intended impact will be heavily influenced by the plans you create for the fund's administration and oversight. Your proposal for the fund should outline (1) an oversight body that ensures the fund is implemented in a manner consistent with the fund's goals, (2) an entity that performs the day-to-day functions of administering the funding, and (3) a process for determining how funding will be spent.</p>
<b>L. Draft your ballot measure</b>	<p>Since the content of your proposed ballot measure hopefully will become law, it is crucial to draft your ballot question and ordinance in time to get feedback from your coalition. Start by gathering information from local election officials about what you're required to submit, how your ballot question will be drafted, and what level of input you'll have. For instance, do you submit only the ballot question or the text of a complete ordinance? Review examples of ordinances and ballot questions that established other children's funds. Create a draft based on what you already know and identify stakeholder groups that will need to review and give input on various sections.</p>
<b>M. Get coalition feedback</b>	<p>The most robust coalitions emerge from the process of collaboration and debate about how a fund will be administered equitably, transparently, and accountably. Plan adequate time for this process to build and strengthen a coalition of support that you can mobilize during the campaign itself.</p>
<b>N. Make it legal</b>	<p>Once you've finalized the content of your ballot measure you'll need to engage counsel that can formalize your proposed legislation and ballot question. Additionally, you may need to negotiate with elected officials or public offices that are tasked with writing or finalizing the questions on your jurisdiction's ballot, depending on your method of ballot placement. Some jurisdictions will have a preferred structure for ballot questions, so be prepared to negotiate to get the best possible framing of your question.</p>

## Build a Strong Campaign Infrastructure

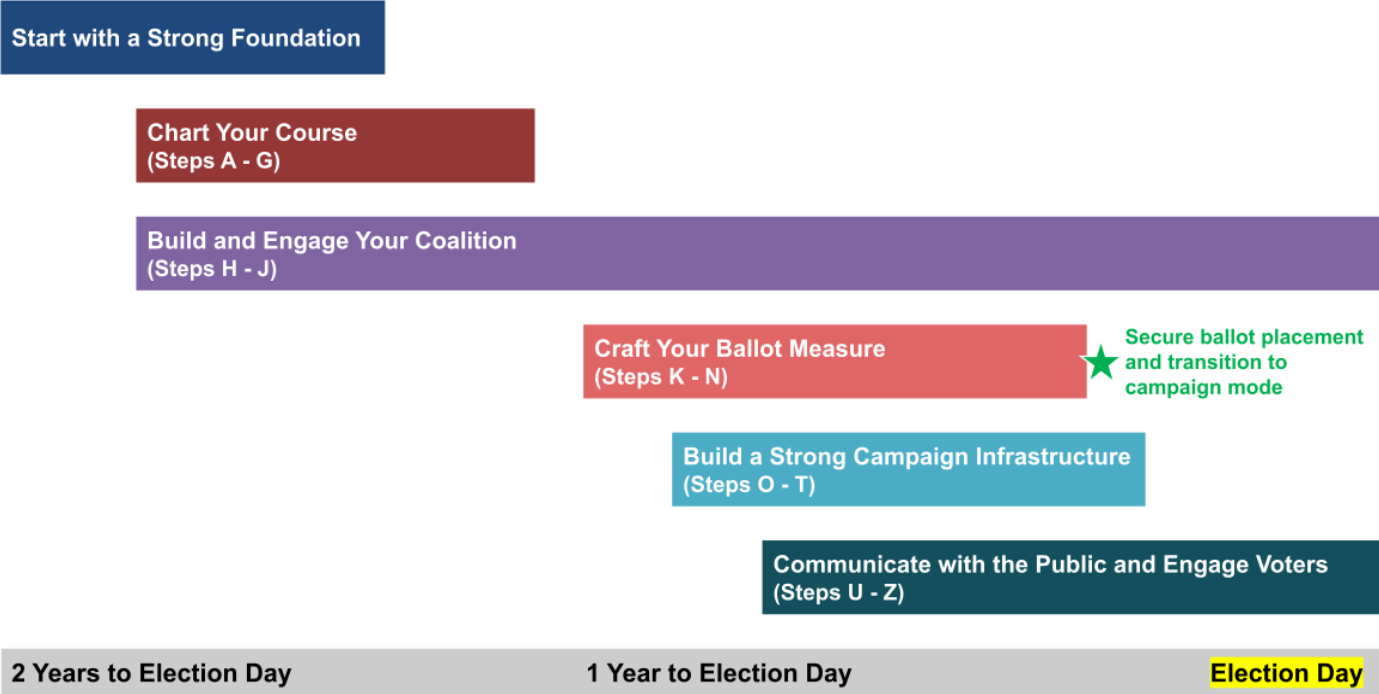
<p><b>O. Recruit a campaign committee</b></p>	<p>As you transition formally and legally into campaign mode you will need to establish a steering committee to guide the campaign. First, identify committee chairpeople whose names will be on formal filing of the committee and bank account. Then, build a committee that can help select and hire campaign staff, fundraise, act as spokespeople, and smooth the political path ahead.</p>
<p><b>P. Create a campaign budget</b></p>	<p>Your budget is a key strategic document for your campaign since it influences how many voters you can persuade before election day. Your campaign committee will need a budget subcommittee that can build a budget based on its assessment of your fundraising capacity and anticipated costs for coalition outreach and coordination, field organizing, communications, research (including polling), and campaign administration.</p>
<p><b>Q. Select a treasurer and open a campaign bank account</b></p>	<p>To fund your campaign, you'll need a campaign bank account to hold contributions and a treasurer to track the flow of dollars. Select a well-respected individual to serve as treasurer who can be responsible for campaign finance compliance.</p>
<p><b>R. Legally establish the campaign</b></p>	<p>Your campaign could be over before it even gets off the ground if you don't take all the necessary steps to officially establish the campaign. The forms you must file will vary from state to state, but your state board of elections should provide information on establishing a ballot measure campaign. Generally, the process will require you to file a committee registration form that names your campaign's treasurer and bank account.</p>
<p><b>S. Hire a campaign manager and develop a campaign plan</b></p>	<p>A good campaign manager and campaign plan can put the lists, volunteers, and campaign contributions you have gathered to work. Ideally, your campaign committee will identify local candidates for campaign manager who have experience running campaigns around similar or related issues. Once selected, your campaign manager will chart the course for your communications, volunteer, and field operations, and will advise your budget subcommittee on the necessary expenditures. Depending on the size of your campaign this person may manage several consultants or firms and staff.</p>
<p><b>T. Focus on campaign fundraising</b></p>	<p>Your campaign staff, legal counsel, message development, website, yard signs, flyers, and social media graphics all cost money. How much money your campaign will need to raise will depend on your polling results, whether your campaign faces opposition, and the size of your community. It is helpful to assign one or more people to lead the fundraising efforts, including identifying large-dollar targets, asking for contributions, training volunteers, and planning fundraising events.</p>

## Communicate with the Public and Engage Voters

<p><b>U. Use polling and a communications firm to develop your communications plan</b></p>	<p>A data-informed communications plan can radically improve your campaign’s chances of success and prevent your campaign from wasting money. Since your first poll likely will focus on informing key decisions, you’ll want to conduct a second poll that focuses on refining your messaging and informing your communications plan. A good poll can tell you which voters you might persuade and which voters you have to turn out on election day so that you can target your communications investments and volunteers. Hiring a communications firm to translate this information into persuasive materials and media can help. Look for a local firm with experience running campaign communications (including social media, website, email, direct mail, tv, and radio) and, ideally, experience with campaigns on similar subject matter.</p>
<p><b>V. Train your coalition on message discipline</b></p>	<p>Train your coalition on your plan and message discipline to avoid sending mixed messages, confusing the narrative, or distracting voters. First and foremost, have a single point of contact for fielding media requests (and a backup person) and train your coalition to direct all media back to that person. Make sure everyone in your coalition understands your core messages and can easily access answers to FAQs. Assign spokespeople/champions to share your message in specific settings and conduct additional training with them before deploying them to reach out to key groups, write op-eds, and participate in debates.</p>
<p><b>W. Set a date to launch your campaign</b></p>	<p>A well-planned campaign launch allows your campaign to control its own narrative. Depending on your campaign’s strategy, this might mean quietly launching your website and engaging earned media (if you’re trying to avoid triggering opposition) or it might mean holding a colorful launch event with a press conference and public figures in attendance (if you’re trying to excite and engage your base). Regardless, consider how your campaign can be the first to share your message on your website, in earned media, on social media, and in your supporters’ inboxes.</p>
<p><b>X. Mobilize volunteers</b></p>	<p>As election day approaches, volunteers can help fundraise, persuade voters, and get supporters to the polls. Large campaigns should make sure a member of their campaign team focuses on volunteer recruitment and mobilization. In smaller campaigns these tasks will be part of the campaign manager’s role. Make it easy for voters who want to get involved to do so by sending out call-to-action emails and providing a wide variety of ways to volunteer, such as canvassing; putting up yard signs; phone or text banking; hosting house parties; and commenting on blogs, radio shows, newspaper forums, and social media.</p>
<p><b>Y. Engage voters and get out the vote</b></p>	<p>In the end, everything comes down to how many voters turn out and say yes to your children’s fund proposal. Once the campaign is in full swing your campaign manager will be conducting an orchestra of coalition members, staff, consultants, and volunteers as they conduct direct voter outreach; implement paid communication strategies; organize phone and text banking, mailers, billboards, TV and radio ads, and social media; follow your earned media plan; and communicate your campaign messages to as many of your target voters as possible. Don’t forget to plan an election night watch party to bring your team together and celebrate your work.</p>

<b>Z. Never give up</b>	The work doesn't stop on election day. If you succeed, congratulations! Children's Funding Project can connect your new fund director with a peer mentor who can guide that person through the first year. If you don't succeed at the ballot, know that many children's funds took multiple tries to pass. Take time to regroup, reconvene to debrief with your coalition, and draw inspiration from the resilience of past efforts.
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# Timeline to Election Day



## ABOUT CHILDREN'S FUNDING PROJECT

Children's Funding Project is a nonprofit social impact organization that helps communities and states expand equitable opportunities for children and youth through strategic public financing.

[childrensfundingproject.org](http://childrensfundingproject.org)