

Criteria to Consider When Deciding to Seek Sales Tax, Operating Levy or Bond Issue Funding from the Public



While governments make decisions about seeking sales taxes, operating levies and bond issues that are driven by needs or necessities, a consideration that is often overlooked is whether the opinion environment is propitious enough for such requests to be viable. **Need alone does not ensure success.** Although public opinion polling and other forms of research are essential for making decisions about what the public wants or will support, based on years of experience assisting local governments, such as cities, counties, school systems, human services providers and transit agencies, based on years of experience assisting local governments, such as cities, counties, school systems, human services providers and transit agencies, Fallon Research has formulated a list of factors that it recommends for considering before placing an issue on the ballot:

Financial Resources Available - Paradoxically, in the information era, waging campaigns for public approval has become more expensive and difficult. Working with a volunteer campaign chairman to develop a prospective outreach campaign budget prior to formally announcing a tax request can avert unpleasant surprises and help develop reasonable expectations about how much money is needed and must be raised;

Human Resources Available – Have a clear understanding of what kind of volunteer force is willing and available for fundraising, delivering pamphlets and signs, and door-to-door public engagement. Don't forget to take into account the time of year, such as the effect of weather, which can dampen spirits;

Timing – Perhaps, the most important – and overlooked – consideration, it is imperative to evaluate the effect of voter turnout, such as what types of voters will participate in a particular election and what proportion of them fits the profile to support your request. It also is important to know what other levy requests will be on the ballot at the same time, so there is an understanding of how much competition there is for donations, volunteers and, importantly, the attention of voters;

Opposition – There are 2 types! Organized opposition is the most feared, and should be addressed strategically, but local governments also should use opinion research to assess passive opposition, such as that emanating from the economy, sensitivity to taxes or a lack of clarity about why money is needed;

Access to Media – Seemingly self-evident, but don't fall prey to the misperception that this is merely about advertising money or paid access to the airwaves, which can sometimes be limited by law. Studies show that many voters still get decisive information from the news media, so assess your relationships with reporters;

Partners – Before making any assumptions, sound out essential strategic partners and stakeholders, such as affected industries or groups, to make sure they are poised to support your request, have a clear understanding of what is at stake for them, and will provide material assistance for outreach efforts;

Attitudes of "Elites" – Major employers, unions, newspaper editors and high ranking elected officials all communicate with large groups of people and hold positions of influence that can be critical, even if they don't endorse your issue or financially support it. They can also help manage the local political "echo chamber" of conventional wisdom that dooms many requests before voters ever get their say. Sometimes just placating elites, so they do not become adversaries, can be essential to success;

Simplicity – Distilling concepts down to messages that are easy to convey, and comprehend, is a task that stymies many efforts, because it is tempting to say too much, at the expense of clarity, or the wrong things, which fail to rouse the public. Deciding why services – and which ones – are important to the public is a vital function of opinion research that can simplify the process by developing a hierarchy of priorities.

For more information about opinion research services, such as public opinion survey polling and focus group testing, in order to determine viability and to assess the public's funding priorities, contact Paul Fallon at 614-341-7005 or Paul@FallonResearch.com.

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