

# Last Vote to First Dollar

## *Transitioning from Campaign Mode to Funding Administration*

October 4, 2023 | 3:30pm

La Villita Room

Children's Funding Institute



Children's Funding Project helps communities and states expand equitable opportunities for children and youth through strategic public financing.

# Presenters



Emmy Liss

Senior Advisor for Early Care and Education, Children's Funding Project



Rob McDaniel

President of MetrixIQ



Sandra Taylor

Former Director of the Oakland Fund for Children and Youth



Kylie Wheeler (Moderator)

Manager of Products & Capacity Building, Children's Funding Project

# Session Agenda

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**Activity** – Assessing Your Starting Line

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**Policy and Programming** – Key Actions of the Fund

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**The Business of Being a Voter Approved Children’s Fund** – Key Operations and Admin Functions

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**Planning and Evaluation** – Preparing for Ongoing Improvement

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**Communications** – Relationships, Partnerships, and Politics

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**Q&A**



# A-to-Z Checklist for a Successful Effort

## Start with a Strong Foundation

- ✓ Experience collaborating for kids
- ✓ Community-wide goals for kids
- ✓ Defined funding needs
- ✓ A motivated coalition
- ✓ A convening entity

## Chart Your Course

- A. Create a steering committee
- B. Determine the fund's purpose and intended impact
- C. Study models of success
- D. Research potential public funding mechanisms
- E. Identify viable pathways to the ballot
- F. Conduct polling to inform decision-making
- G. Select an election date and create a timeline

## Build and Engage Your Coalition

- H. Conduct outreach and build your lists
- I. Create opportunities for multiple types of engagement and make the ask
- J. Transition your coalition into campaign roles

## Craft Your Ordinance and Question

- K. Plan your fund's infrastructure for administration and oversight
- L. Craft a draft
- M. Get coalition feedback
- N. Engage a lawyer and negotiate with elected officials and public offices
- O. Submit for ballot placement
- \*transition to campaign mode\*

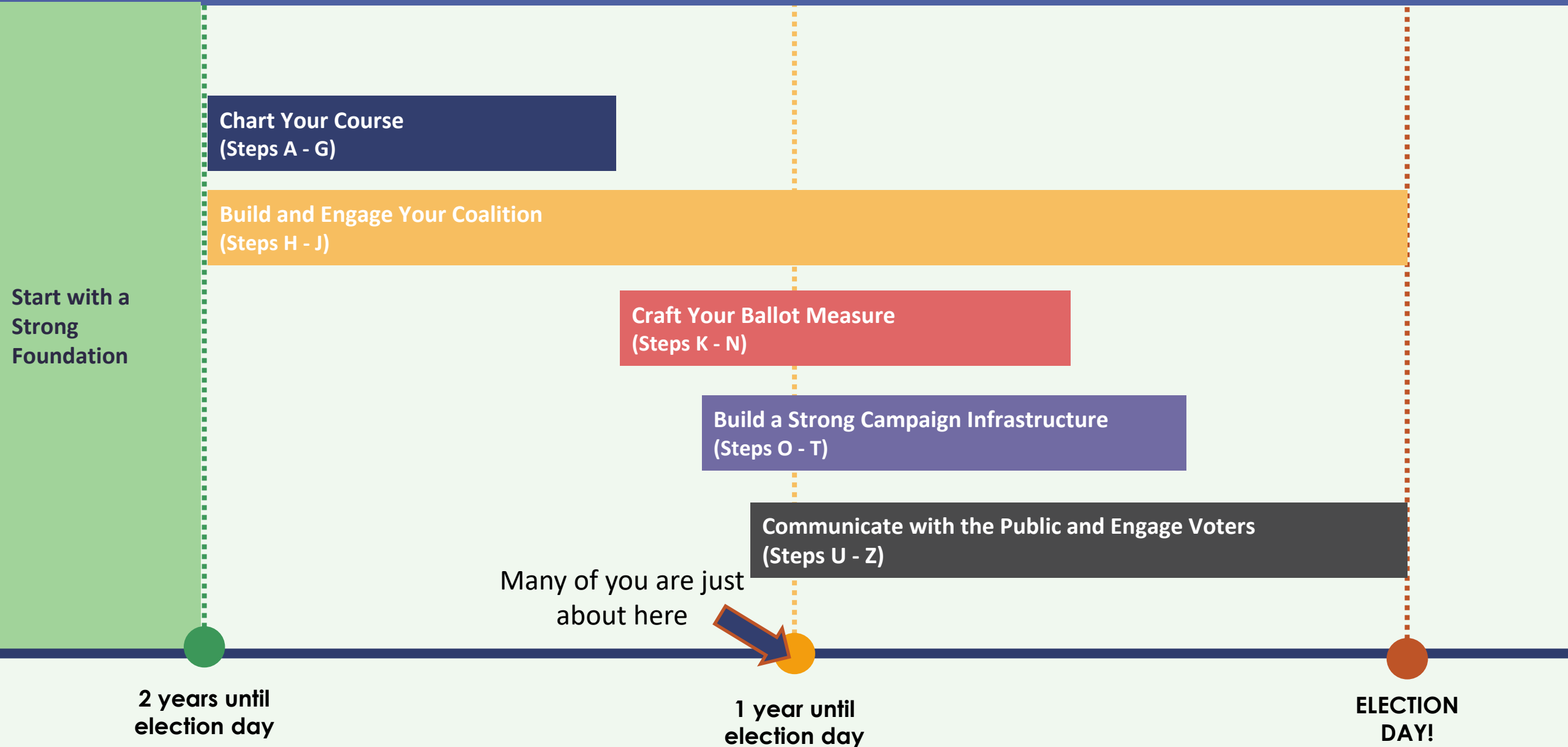
## Build a Strong Campaign Infrastructure

- P. Recruit a campaign committee
- Q. Create a campaign budget
- R. Select a treasurer and open a bank account
- S. Legally establish the campaign
- T. Hire a campaign manager and develop a campaign plan
- U. Focus on fundraising

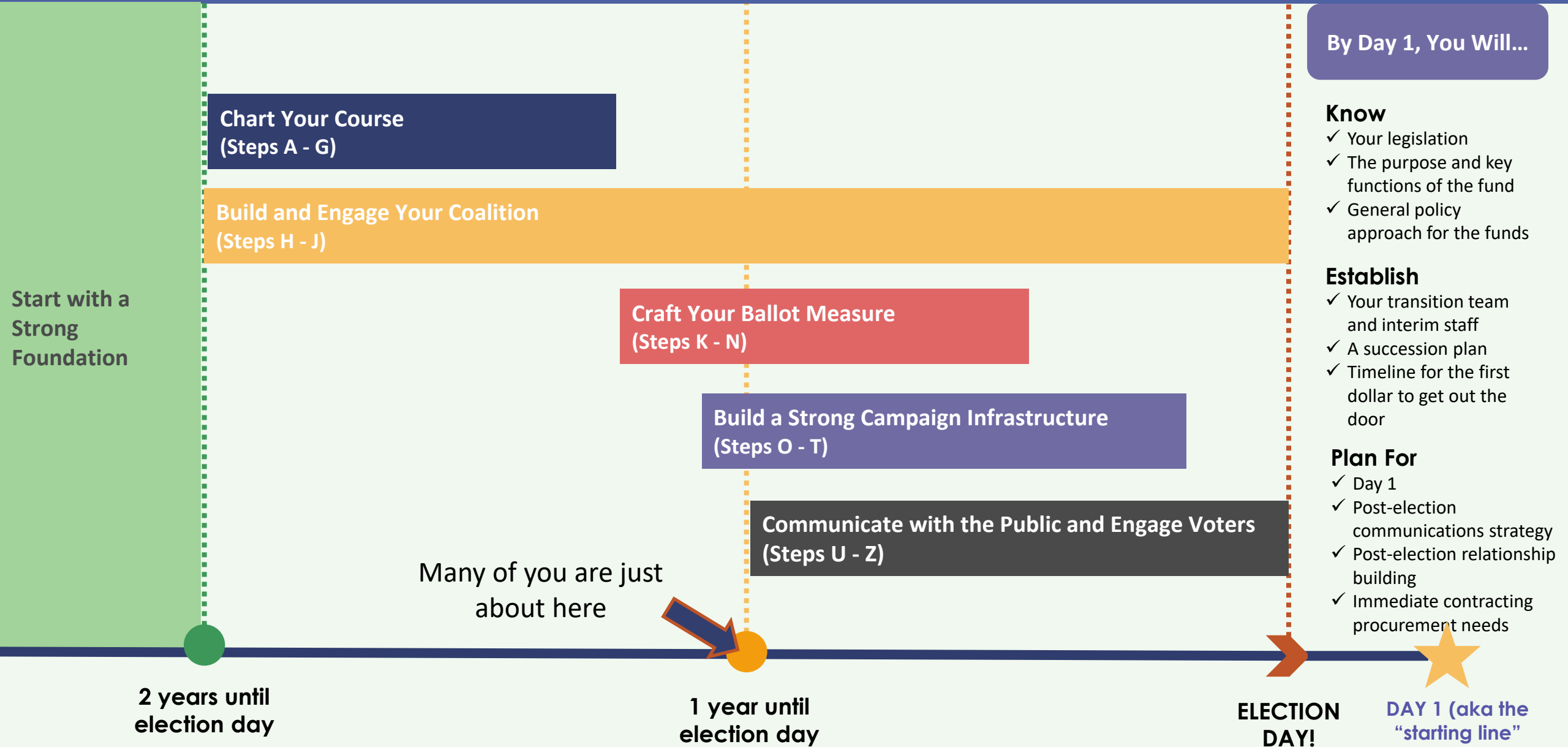
## Communicate with the Public and Engage Voters

- V. Use polling and a communications firm to develop your communications plan
- W. Train your coalition on message discipline
- X. Set a date to launch your campaign
- Y. Mobilize volunteers
- Z. Engage voters and GOTV!

# Timeline to Election Day



# Timeline to Day 1



# KNOW

## ❑ Your legislation

*Understanding the legal language, built-in flexibilities and the implications of the ballot measure is critical to eventually translating the legalese of the measure into an actionable and operational voter-approved children's fund.*

## ❑ The purpose and key functions of the fund

*Becoming clear about what and to whom the funds are going to be used for will dictate how the funds will be allocated and direct some key aspects of the policy and programming design, operations, and administrative tasks.*

## ❑ General policy approach for the funds

*Getting a general policy approach for the funds will help you select eligibility requirements and that dictate how the funds are going to be distributed.*

# ESTABLISH

## ❑ Your transition team and interim staff

*Having a dedicated team that will transition from campaign roles to implementation roles helps keep continuity in knowledge and serves in critical decision-making roles while permanent staff and administration infrastructures are being established.*

## ❑ A succession plan

*Since most of the transition team and interim staff will not be permanent roles in the newly establish voter-approved children's fund, a succession plan should be outlined so that knowledge, progress and critical initial decisions do not fall through the cracks.*

## ❑ Timeline for the first dollar to get out the door

*Most funds will have a planning period before the first dollar is expected to get out the door. A timeline of key decisions and milestones should be created to maximize the planning period.*

# PLAN FOR

## ❑ Day 1

*After a night of election victory celebrations, it's time to get to work!*

## ❑ Post-election communications strategy

*Once you win, the public will still be interested in how the program is being implemented. Be sure to have regular updates to the public to show them how you plan on making good on the campaign promises.*

## ❑ Post-election relationship building

*Relationships after election night will change. Have a plan to ensure that those partners who need to have a voice in creating policy are at the table.*

## ❑ Immediate contracting procurement needs

*Some of the first needs may require a contract or request for proposals (RFP) process. Getting a head start on drafting contracts and/or requests for proposals can help make the initial lift a little easier.*

# Activity

## *Assessing Your Starting Line*



<https://www.menti.com/alqa7ugd4yij>





# Policy & Programming – Key Actions of the Fund

*Emmy Liss, Senior Advisor for  
Early Care and Education,  
Children's Funding Project*

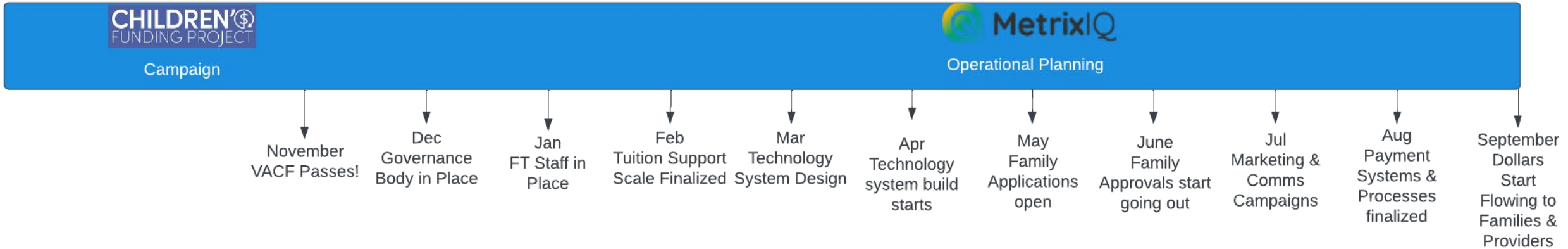
# Setting Your Voter-Approved Children's Fund Up for Success

Preparing Operationally for First Dollar Out

**Rob McDaniel**  
President  
MetrixIQ



# Ideal Timeline



# Operational Workstreams

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GOVERNANCE &  
ADMINISTRATION



BUSINESS PLAN



BUDGET

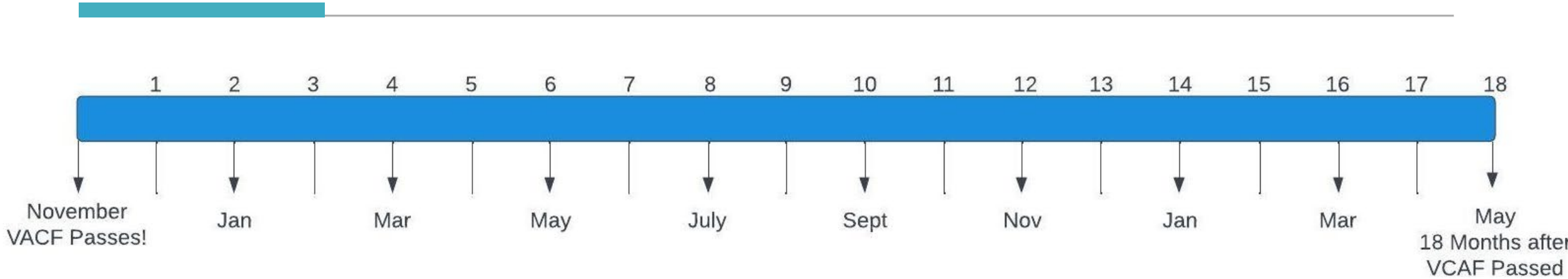


CONTRACTING



TECHNOLOGY  
INFRASTRUCTURE

# If Done Linearly



# Next Steps

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Not everything has to be figured out at once



Deep dive into the five silos



Talk to colleagues/communities who have gone first for 'lessons learned'



Come chat with us at Office Hours! Today, 4:30 PM Onward



# Planning & Evaluation – Preparing for Ongoing Quality Improvement

*Sandra Taylor, Former Director  
of the Oakland Fund for  
Children and Youth*

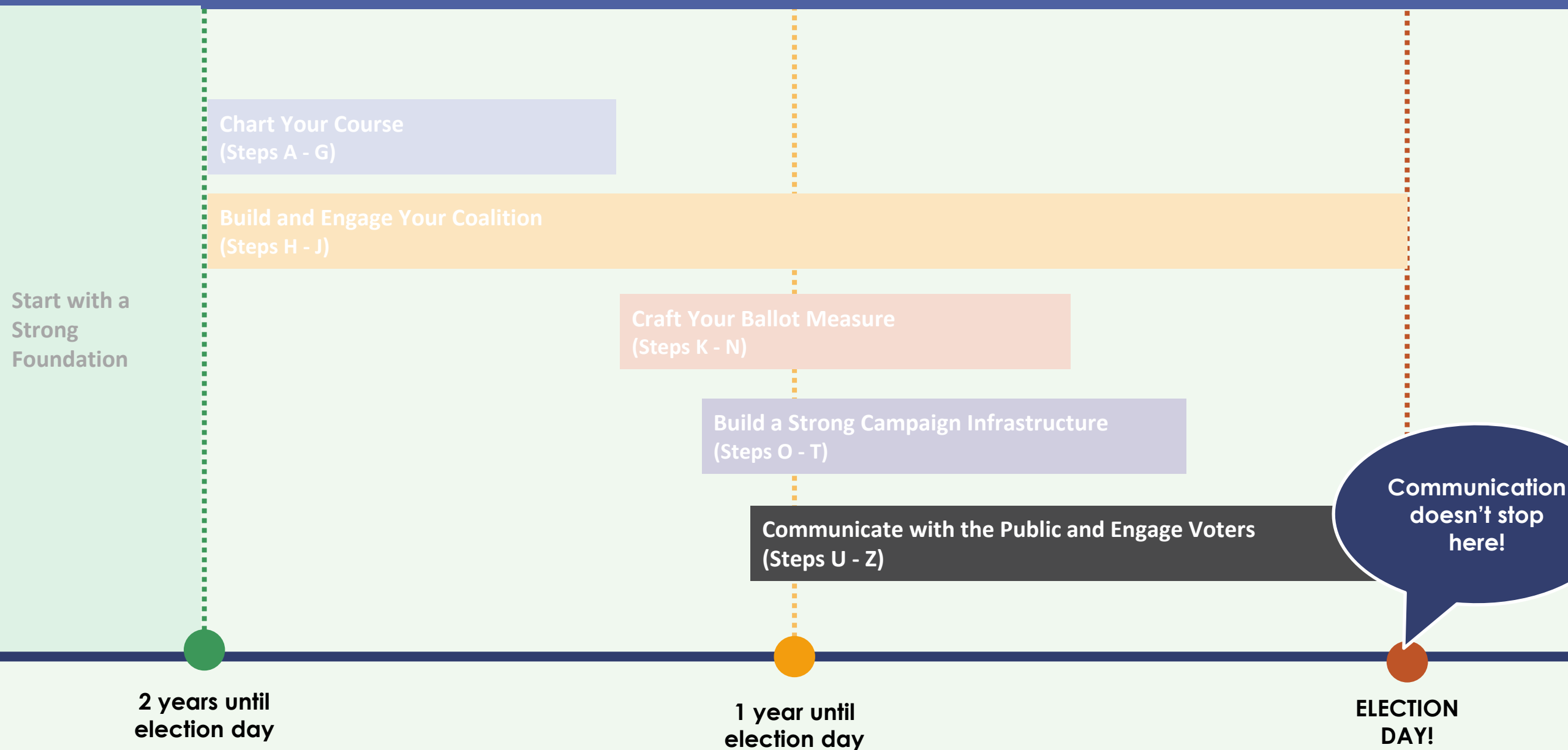


# Communications – Relationships, Partnerships & Politics

*Panelist Discussion*



# Building Trust & Relationships Beyond Election Day



# Panelist Discussion

- Can you speak to the role of communications, messaging, and relationship-building for each of the areas you've focused on today?
- If you were involved in both the pre-and-post election day communications for a VACF, how did your strategies and priorities evolve?
- What tips would you give a VACF transition team for ensuring that they continue to build and reinforce trusting relationships with different stakeholders in the transition to implementation?

# Q&A



# Thank you!

## What's Next?

- 4:20-4:30: Coffee Break
- 4:30-5:00: Office Hours (La Villita Room)