

OPERATIONAL PLAN

NATIONAL 8002 IMPACTED SCHOOLS

September 21, 2014

I. HOW DO WE CLARIFY AND PROMOTE WHO WE ARE?

GOAL STATEMENT: Everyone who impacts or is impacted by a federal presence within a school district will have a clear understanding and recognize the importance of funding for students of the 8002 program.

- A. **OBJECTIVE:** Develop 8002 information materials and/or put more 8002 information on the NAFIS webpage and maintain a consistent message
 - 1. Communicate through an 8002 website – To Be Developed in TARGET AREA IV
 - a. Mission, Vision, Guiding Principle
 - b. Diagram of relationship among NAFIS organizations
 - c. Talking Points
 - d. Glossary of terms
 - e. Story of each 8002 district regarding lost revenue or what could be done with full funding. (All districts must participate)
 - 2. Reinforce the mission/vision statements often
 - 3. Make sure messages have relevance
 - a. Clarify the reason the 8002 program was created and why it is still legitimate today.
 - 4. Create a one-page handout (TRI-FOLD ALREADY EXISTS)
 - a. Materials developed for posting on the website will be shared with the 8002 group for input prior to posting.
 - 5. Illustrate in a meaningful way the impact of lost revenue

ACTION PLAN:

- 1. Group #1 will coordinate with group #4 in developing and providing materials to post on the website by January 2015.
- 2. Group #1 will develop the materials listed in objective A 1-3 by January 2015.
Group #1 will receive and analyze input received by the 8002 group on materials shared by Group #1 prior to posting on the website.

ASSESSMENT STATEMENT:

1. The number of hits on the website will increase after the materials have been posted.
 2. The participation of legislative 8002 staffers in FRO will increase by 10 percent per year.
 3. The number of presentations per year made by each school district regarding 8002 will increase.
 4. Increase Impact Aid Coalition membership by House and Senate legislators representing 8002 membership.
- B. **OBJECTIVE:** Be a presence at NAFIS conferences during General Sessions
1. Create a general 8002 video to be utilized at various conferences and at individual districts.
 2. Explain 8002 during a general session along with MISA, NIISA and Low Lot
 3. Schedule a training session about 8002 application, vouchers, etc. at NAFIS Conferences

Action Plan:

1. Group 1 will ask for volunteer districts to do an 8002 video at each of the four next conferences, video to be produced by the fall 2015 NAFIS conference.
2. Group 1 will send an email to member districts requesting volunteers to produce a general 8002 video.
3. Membership will preview the video at the summer 2015 8002 conference.
4. Objective B2 is being met through panel discussions at both the fall and spring NAFIS conferences. Recommend continuing with 8002 general session presentations.
5. Objective B3 is partially being met through the NAFIS Conferences session, the Basics of Impact Aid.
6. Offer a training session for new attendees the afternoon prior to all conferences.
7. Solicit questions from prospective attendees in advance of session via email, or other social media and at conferences
8. Post information about training session on SharePoint and through other social media as it becomes available.
9. Ask Tom Madden to check with NAFIS about the possibility of including a box on the registration webpage that indicates a first time attendee.

ASSESSMENT STATEMENT:

1. Objective B1 will be considered achieved when the video is actually available for viewing at the Fall 2015 NAFIS Conference.
2. The implementation will be considered successful if 50% or more respond positively to feedback received by NAFIS' conference survey; and if five or more districts use the video for presentations in their districts.

3. Objective B2 will be considered successful if presentations at NAFIS Conferences continue.
4. The implementation will be considered successful if 50% or more respond positively to feedback received by NAFIS' conference survey.
5. Objective B3 will be considered implemented when the first training session is offered by the afternoon prior to the beginning of the Spring 2015 NAFIS Conference
6. The implementation will be considered successful if 50% or more respond positively to feedback received by NAFIS' conference survey

C. OBJECTIVE: Change the name of the organization

Action Plan: Continue to solicit suggested organization names from the membership which meet the following criteria: easy to remember, descriptive of our mission, and inclusive of student impact.

ASSESSMENT STATEMENT: Ongoing. The objective will be considered achieved when the membership approves a name change.

D. OBJECTIVE: Prepare and present an overview of the 8002 program for local school boards to facilitate understanding of the impact of the program on the school district

Action Plan: Group 1 will:

1. Review , amalgamate, and add to existing information currently being used to describe the program.
2. Develop template presentation utilizing information currently available.
3. Customize each presentation to meet the needs of individual district boards.
4. Generic template will be presented to the membership for review and evaluation by the summer conference 2015.
5. Identify a group who would be willing to present to school boards as necessary.

Assessment Statement:

1. Positive feedback provided from the membership after review of template at the summer conference 2015.
2. The presentation will be utilized by at least three or more districts with at least two out of the three providing positive feedback.

II. HOW DO WE GET CONGRESS TO UNDERSTAND THE TRUE IMPACT OF THE LOSS OF TAXABLE PROPERTIES?

GOAL STATEMENT: Best practices and an accountability structure to continually educate, communicate and promote the non-partisan need for 8002 funding to communities and Congress will be established.

- A. **OBJECTIVE:** Tactics and Strategies for delivering the message - Continually educate, communicate and promote a non-partisan message that can be targeted to Federal Properties member districts, Congress and Federal Properties communities.
 - 1. Develop a list of best practices (including samples) for communicating to Federal Properties member districts, Congress and Federal Properties communities.
 - a. Keep in front of legislators with a greater focus on their local offices
 - b. Keep communication simple/understandable and use local media more to get the message out
 - c. Emphasize to congress the federal responsibility/obligation to pay “their” tax bill as other taxpayers must
 - d. Craft and deliver a consistent, non-partisan hill message from all 8002 members and from all members of NAFIS
 - e. Develop a non-partisan message which effectively respond to the election and budget calendar.
 - f. Humanize the story by connecting to students/teachers/programs
 - g. Communicate what funding provides, and personalize it per school district
 - 2. Expand the number of Federal Properties member districts, Congress representatives and Federal Properties communities receiving our non-partisan message.
 - a. Utilize state coalitions to engender collaboration and a synergistic approach to message development.
 - 3. Create an 8002 website link to/from NAFIS website to make it useful to 8002 and NAFIS members, parents, media, and legislators.

ASSESSMENT STATEMENT:

- 1. Post list of best practices for Federal Property members on the organization’s Sharepoint web site by Winter, 2014 meeting.
 - 2. All school districts receiving \$100,000 or more in Impact Aid dollars will be members of the Federal Properties organization.
 - 3. Establish a website page which presents our message for parents, legislators, community members and members of congress.
- B. **OBJECTIVE:** Develop a non-partisan message that can be targeted to both Congress and Federal Properties communities that:

- 1. Demonstrates a sensitivity to each sides' position**
- 2. Provides flexibility to tailor message to each side**
 - a. Reflects that Impact Aid is a Federal Obligation.**
 - b. Acknowledges that Impact Aid has a connection to local taxes.**
 - c. Connects Federal Impact Aid to the education of children.**
- 3. Create a spreadsheet/document showing the amounts of property tax revenue loss for each district in the program**
 - a. Show property tax loss on a per pupil basis and personalize that loss – staff/program cuts, higher class size, etc.**

ASSESSMENT STATEMENT:

- 1. Increase number of Members of Congress on the Impact Aid Coalition by 10% per year by July 1, 2017.**
 - 2. Members of the Federal Properties organization will receive information on the non-partisan message that can be tailored to each of constituent groups (i.e. Parents, Community, both parties in Congress) at each meeting.**
- C. OBJECTIVE:** Develop an accountability structure which sets forth expectations for Federal Properties districts.
- 1. Provide opportunities for Federal Property districts to report out their successful message sharing.**
 - 2. Set a measure to quantitatively measure our efforts as individual districts and as an organization.**

ASSESSMENT STATEMENT:

- 1. The Federal Properties organization will send each 8002 eligible district receiving over \$100,000 a survey to gather data related to how many best practices, Congressional contacts, etc. were made by the member district during the calendar year. The Federal Properties organization will send a letter to the member district's board of education commending the district for their involvement and gather metrics related to the number contacts, etc. made yearly.**
- 2. During each meeting, every district will present a brief overview of their efforts to advance the cause of Impact Aid between meetings. The information presented will be added to the best practices list.**

III. HOW DO WE INSTILL A SENSE OF URGENCY AMONG 8002 PARTICIPANTS AND MEMBERS OF CONGRESS?

GOAL STATEMENT 1: Communication with all 8002 impacted districts

- A. Objective: Involvement - Reach out to, involve and visit non-participating 8002 recipients; Reach out to inactive members
 - 1. Follow up after each meeting to non-attendees (membership committee role)
 - a. Prefer human touch – phone call or visit (regionally)
 - b. State Consortium – Ex. TAFIS – Texas Association Federally Impacted Schools
 - c. Meet twice a year, if possible, and invite members of Congress to that meeting
- B. Objective: State or Regional Consortium Development
 - 1. Identify participants at the state level using the “Bluebook” information from the NAFIS website
 - 2. We need to target 100% involvement within each state of all districts Impacted.
 - 3. We need to identify “champion” congressional representatives in each state or region and then have the school district representative contact the directly
 - 4. We need a broader representation for other states. Currently mostly concentrated in California, South Dakota, and Illinois
 - 5. We identified that cost and time are probably the biggest factors keeping folks from attending the meetings
 - 6. We identified there are different levels of urgency within districts
 - 7. We need to further identify why districts do not attend and assign a mentor to those districts
 - 8. State meeting organization thoughts:
 - a. Categorize states
 - b. Organize states
 - c. Have state meeting in a city where the congressional representative has an office
 - d. Identify which congressional representative might be “8002” friendly vs. those who are not

e. Possibly invite congressional representative to those state meetings

ASSESSMENT STATEMENT: By January, 20117, 80% of 8002 districts will have participated in some way with promoting the 8002 cause.

GOAL STATEMENT 2: All 8002 impacted districts create a brief and concise document sharing their personal stories.

TEMPLATE FOR PERSONAL STORY DOCUMENT SHALL INCLUDE THE FOLLOWING:

District Name, Impacted Area, Number of Students Served, Personal Narrative

Action Steps

Original database

District

Superintendent

Address

Address

Town

State

Zip

Email for superintendent

Filing contact if available

DC Meeting

Mailings out with:

Letter of organization purpose

Direct impact to them

Form for personal narrative

Winter Meetings

Assessment at that point

Data compilation

Update the list

Resend to missing districts

State meetings held

ASSESSMENT STATEMENT: By January, 2017, 75% of 8002 districts will have created their respective documents and implemented a strategy for its distribution.

GOAL STATEMENT 3: 100% attendance at state or regional meetings

A. Objective: Send out a summary after meetings

1. Contact qualified 8002 districts that are non-members
2. Educate community members

B. Objective: Message Focus

1. Educate others on how much funding is received
2. Translate into what the dollar support re: number of teachers, programs, class sizes
3. Reiterate constantly, honestly and factually the effects of cuts using real school district stories

B. Objective: Methods

1. Get members of Congress into 8002 schools
2. Use experienced mentors to bring new participants up to speed
3. Create an organized, efficient means of communication and use technology
4. Communicate urgency to 8002 districts through emails, newsletters, etc.
5. We will dedicate some time to produce document communicating with all participating districts

ASSESSMENT STATEMENT: On average, 40% of 8002 districts will attend the various state or regional meetings.

IV. HOW DO WE UTILIZE TECHNOLOGY AND SOCIAL MEDIA TO BE MORE EFFECTIVE AS AN ORGANIZATION (BOTH INTERNAL AND EXTERNAL)?

GOAL STATEMENT: The 8002 Federal Properties Organization will provide every impacted entity with immediate and efficient access to appropriate and pertinent impact aid information.

A. OBJECTIVE: Increase communications to, within, and between various groups through the use of technology

1. We have identified the following groups to be included in the communications:

- 95 8002 members
- Exec Board
- 8002 Districts that receive \$\$\$
- NAFIS
- Media
- Parents
- Legislators & Aides
- 8002 meeting attendees
- Local Officials
- Congressional Staffers (2 each)
- Database of 8002 Contacts (at least 2 each)
- Video Training for Applicants/8002
- Tiered approach to Districts- Multiple Contacts
- State Contacts- Leadership

2. We have identified the following means of communication:

- Static Information- NAFIS Website- Searchable
- Dynamic information- Blog, Newsletter (Tom S.), Legislation
- Video Message- provide information on who/what/??? (downloadable)
- Links of District Websites
- Database of information 8002. i.e. Legislative aides by office, Acres, \$\$\$, etc
- Two-way communication between members.

ACTION PLAN:

1. Group #4 will seek an individual, district, group or private company to create and maintain a website for our group before January 2015.
2. Group #4 will coordinate with group #1 in developing and providing materials to post on the website by January 2015.
3. Group #4 will seek an individual district, group or individual to create and maintain a Facebook Page for our group that will work in conjunction with our website.
4. Group #4 will work with Tom Schneider to develop a method (blog, twitter account, etc.) that Tom will be comfortable with that can be used by all to provide instant information to all on what's happening politically with Impact Aid.
5. Group #4 recommending that the website contain a list of links to all member and 8002 funded districts' websites.

6. Group #4 recommends that our community develop policies regarding the filtering of information to be posted that will be available to some or all.
7. Group #4 recommends that we immediately pick a name for our organization so that our website and other tools can be developed and labeled appropriately.

ASSESSMENT STATEMENT:

Formal and informal evaluation of the success of our communication activities will be conducted on a yearly basis and adjustments will be made as needed to match members' responses.

V. *WHAT DO 8002 MEMBERS NEED FROM THIS ORGANIZATION AND HOW DO WE MAKE MEETINGS AND MESSAGES MORE VALUABLE AND MEANINGFUL?*

GOAL STATEMENT: Members will have the necessary resources to educate themselves and others and effectively lobby legislators resulting in impact aid funding being sustained or increased.

A. OBJECTIVE: Develop confidence among members of Section 8002 in lobbying by providing helpful tools

1. Better educate our legislators (state and federal)
2. Determine a consistent approach to congress
3. Associate impact aid with "impacted students"

ACTION PLAN

1. Adapt/update the targeted lobbying one page flyer
2. Collect data regarding the number of students served in 8002 districts
3. Meet with legislators in their home district office in addition to meeting in D.C.
4. Seek to organize meetings/break-out sessions for administrators and board members at their professional organizations' meetings

ASSESSMENT STATEMENT:

1. Attendance at Section 8002 meetings will increase to an average of 20% of eligible districts
2. Targeted Lobbying Document is updated
3. When surveyed, 75% of the members report that they know and can share the consistent 8002 lobbying message to legislators

B. OBJECTIVE: Increase Communication with 8002 Districts

ACTION PLAN:

1. Provide application information, including deadlines in a "How To" format

2. Provide information about the history of impact aid and NAFIS, subgroup descriptions, and acronyms used regularly in NAFIS and Section 8002
3. Provide Legislation Updates – alerts, pertinent information, what is happening now, summary of documents on legislative changes, etc.
4. Reach out to those recipients of 8002 money that can't afford to attend our meetings but can still fight for our cause

ASSESSMENT STATEMENT:

1. Informative documents posted or provided
2. Information sessions conducted
3. Legislative Updates provided
4. A data base of contacts with non-attending 8002 recipient districts with pertinent info is created and maintained.

- C. **OBJECTIVE:** Meetings will effectively and efficiently communicate and organize information in an engaging process

ACTION PLAN:

1. Handouts will be made available online prior to the meetings
2. If NAFIS and the Dept. of Ed participate in Section 8002 meetings they will provide specific info other than the info provided in general sessions
3. Schedule summer and winter meeting locations that are desirable, easy to get to and reasonably priced to encourage additional attendance
4. Plan meetings to more actively involve the members with member interaction and input
 - a. round robin info tables with topics like lobbying tips, tips for encouraging board members to support meeting attendance, etc.
 - b. operational planning review and assessment
 - c. bring in local legislators and outside experts

ASSESSMENT STATEMENT:

1. Handouts posted
2. Attendance at meetings increases
3. Memberships reports that meetings are helpful, informative and interest and a good use of their time

PROPOSED ORGANIZATIONAL STRUCTURE ON NEXT PAGE

Note that the Executive Board oversees the entire process. The “pointed lines” indicate that each of the three committees will work directly with the Executive Director and can also work directly with the other two committees. If the Executive Board engages the services of a tech person, that person would work directly with the Executive Director, again under the guidance of the Executive Board.

EXECUTIVE BOARD

NATIONAL 8002 IMPACTED SCHOOLS

