



Missouri Association of Levy Boards & Senior Organizations

SENIOR LEVY ADVOCACY TOOLKIT

A guide for persons and organizations interested in placing a senior levy fund on the local ballot to support adults 60 years of age and older.

Version revised August 2023 ©

This toolkit is available for print and download at www.moalso.org



Congratulations!

If you are using this advocacy toolkit, you might be considering how a Senior Levy Tax could benefit your community. Campaign work is exciting but can be intimidating. Becoming a strong advocate has its rewards and is worth the effort. We are hopeful that this toolkit will help you in evaluating your readiness to put a senior levy on the ballot, and help you take the steps needed for its successful passage.

As more Missourians live longer and healthier lives, the longevity and productivity of our society will also expand. But to make the most of this important source of social energy, it is incumbent on all of us to assure that our public policies support better aging outcomes. As a state, we need to be smart about strengthening it as well as developing other ways to make sure we all have what we need to age well.

Missouri law, however, provides counties with a mechanism to fund the health, social services, transportation, meals, and other essential services for Missourians 60 and older. Passed in 1990, the enabling legislation allows counties to adopt property tax levies for the creation of service funds to support adults sixty years of age or older living in the community. “Senior Services Funds” are enacted on in a county with a simple majority vote.

The levy, which is collected along with other county or city taxes and deposited in a segregated fund, is governed by an appointed community members which in turn creates a budget, and oversees grants to agencies and service providers, and depending on the amount collected may hire staff to support the administrative responsibilities.

As of 2022, **55 Missouri counties have voted to pass levies**, 40% passed prior to 2000 and 60% having passed between 2000-2008, with most (91% percent) passing the levy on the first ballot. Thanks to these efforts, counties have raised nearly **\$20 million in funds statewide** to serve older Missourians. To be successful in passing a ballot measure, it is critical for older adult advocates and senior service



agencies reach out to their communities with a positive message and provide clearly stated goals to the public as to why this fund is vital to allowing more older adults to age in the community.

By taking these steps, you will help ensure a successful passage of a levy. This toolkit is intended to be a resource that describes steps you can use as the foundation to pass an ordinance in your county.

We would like to thank the Missouri Foundation for Health for their financial support in the development of MoALSO. We also acknowledge the Penman Group and their excellent project management in developing the website and other activities as well as policy consultant, Laura Loyacono for writing and developing this Toolkit.

Please note, additional help and technical assistance is available through MoALSO. Not only is there information for counties interested in adopting a levy, but once the levy is passed, we can assist with setting up the new fund, by providing guidance on governance structure, by laws, budgets, and reporting.

Please contact us about additional information and learn about technical assistance available to you.

Sincerely,

MoALSO Officers

Tina Uridge, President

Debbie Gwin, Treasurer

Jamie Opsal, Secretary



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1. Introduction: Missouri Senior Levies

What they are and what they fund

Established in State Statute

Established in state statute in 1989, statute authorizes levies on the county ballot, describes the appointment and governance of a Senior Citizens' Services Fund Board, and establishes fund uses. RSMo 67.990 allows counties to go to the votes to allow a tax of up to 5 cents per \$100 of assessed valuation upon all taxable property for the purpose of providing services to persons sixty years of age or older. (Visit the revised statute of MO ¹) For a home assessed at \$200,000, the tax would roughly equate to \$19.90 per year or \$1.66 per month (example on p.7).

Funds for Programs Serving Older Adults

Some counties that have passed a senior levy fund have directed their funds toward expanding services that the local Area Agency on Aging provides to serve more people such as:

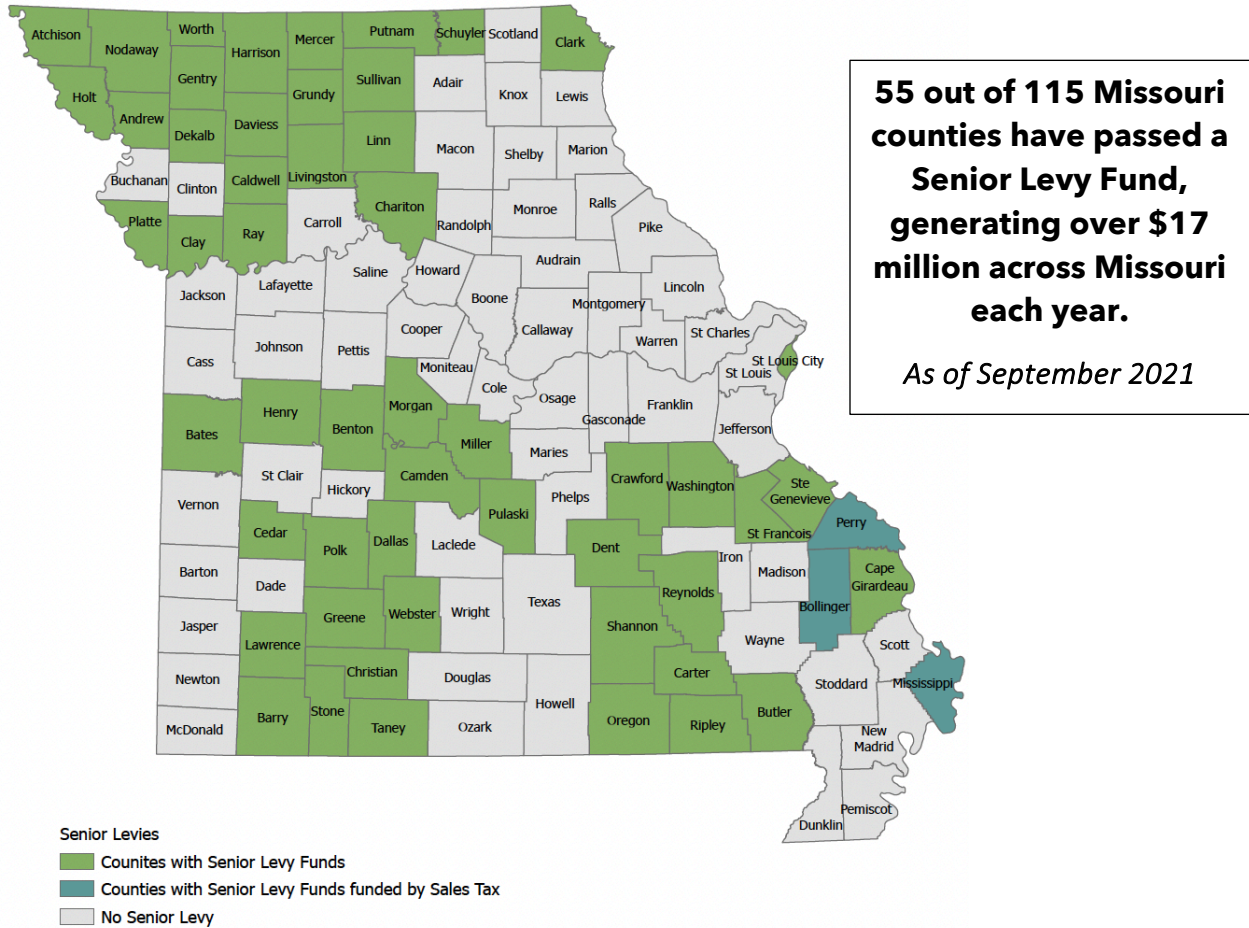


- Home-delivered meals
- Senior center development
- Transportation
- Home-safety repair programs or fall prevention programs
- Health care assistance
- Oral Health
- Immunizations
- Support for older adults in their homes with activities of daily living or instrumental activities of daily living

¹ <https://revisor.mo.gov/main/PageSearch.aspx?idx=2&op=and&tb1=senior%20citizens%27%20services%20fund&tb2=>



Other Senior Levy fund counties have used their funds to provide services that allow older adults to age in communities that are simply not available through their local Area Agency on Aging. Notable programs include the Give Five Volunteer Program or the Falls Prevention programs.



How to Calculate the Levy Amount

To estimate the amount of revenue generated by a senior levy, you must contact the County Clerk to obtain the total assessed value of real and personal property collected and multiply that number by the levy amount (up to 0.05) and divide that number by 100 (see example on next page).



Worksheet - Calculating Senior Levy Fund Revenue

Contact the Clerk of the County Commission and obtain these figures for the previous year

EXAMPLE

Real Estate

Residential \$ _____

Agricultural \$ _____

Commercial \$ _____

Real Estate Total \$ _____

Personal Property \$ _____

Railroad & Utility (Real Property)

Local Assessed \$ _____

State Assessed \$ _____

Grand Total \$ _____

ASSESSMENT X .0500

Grand total times .0500

÷ 100

Divide new total by 100

**TOTAL. TO BE COLLECTED BY SENIOR
LEVY**

\$ _____

Real Estate

Residential \$ 1,797,522,52

Agricultural \$ 12,047,878

Commercial \$ 605,567,483

Real Estate Total \$ 2,415,137,666

Personal Property \$ \$571,447,482

Railroad & Utility (Real Property)

Local Assessed \$ 116,641,421

State Assessed \$ 105,533,217

GRAND TOTAL \$ 3,290,331,395

ASSESSMENT X .0500

Grand total times .0500

÷ 100

Divide new total by 100

**TOTAL. TO BE COLLECTED BY SENIOR
LEVY**

\$ 1,645,165.69



A listing of Missouri Senior Levy Funding Boards and their revenue generated for 2021 can be found online² and can help you determine potential impact for your county. A few examples can be found below:

County	Assessed Value	Levied	Revenue Generated 2022
Greene County	5,556,350,195	0.0486	2,988,900
Platte County	3,178,796,161	0.0457	1,510,262
Christian County	1,523,684,371	0.0469	765,204
Stone County	745,268,739	0.0482	385,401
Bates County	248,578,511	0.0500	135,530
Cedar County	196,197,727	0.0497	103,040

² <https://www.moalso.org/senior-levy-counties>



2. Before the campaign: Are you ready?

This toolkit is intended to make sure that you are 100% ready to go with your Senior Levy Campaign effort. We will help you answer key questions including:



The process for adopting a senior levy and creating a Senior Services Fund is spelled out in Missouri state law (RSMo 67.990 – 67.995). Statute allows the governing body of any county (or city not within a county) to levy and collect a tax on real and personal property, upon passage of a ballot initiative. The statute also provides a framework for county election authorities to put the question to a vote, which generally requires the local county authority to pass an ordinance referring the question for a ballot.

However, the process to getting voter approval is not always straight forward. Every community is different. The mix of local elected officials may be progressive or conservative, open to new ideas or closed to any new taxes. Your locale may be rural, suburban or urban. While public officials tend to take their constituents’ interests seriously, they may not agree with your approach.

As you will discover in the toolkit, a critical first step is building a coalition, made up of well-respected individuals and organizations who have established relationships with county officials and the



community at large. This coalition is key to determining how receptive your local government will be to placing the levy on the ballot, and ultimately how receptive voters will be to passing it.

Public policies that seek to improve the lives of individuals are key to helping people live longer healthier lives. As an advocate, you have a responsibility to raise the awareness about the disparities in the community that you serve. Further, if advocates for older adults don't speak up and advocate for change, your community will lose out on vital public resources.

In matters of public policy, the voices of older residents and their family members matter more than ever. Not only are older adults the fastest growing segment of the population, but their political power is growing. According to AARP, voters 50 and older are the most important and reliable voting bloc. Elected officials care deeply about the voices of their constituents and your role is helping their voices be heard. More information on the growing older adult population will be addressed later in the toolkit.

A note about Advocacy vs. Lobbying as it applies to your coalition

There are several levels of government concerned with advocacy and lobbying. Recognizing the difference will help your agency to stay compliant with local, state, and federal laws.³ However, it is important to realize that as an agency, you are well within your purview to advocate directly to elected officials on matters concerning your agency or cause. **As an agency, you can work to raise awareness about issues concerning older adults and your coalition and individuals may work towards creating a ballot measure, without it being considered lobbying.**

“While all lobbying is advocacy, not all advocacy is lobbying. Advocacy is any action that speaks in favor of, recommends, argues for a cause, supports or defends, or pleads on behalf of others. It includes public education, regulatory work, litigation, and work before administrative bodies, lobbying, nonpartisan voter registration, nonpartisan voter education, and more.” - The Alliance for Justice

³ <https://www.councilofnonprofits.org/advocacy-vs-lobbying>

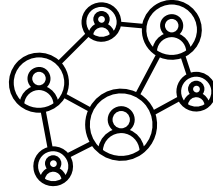


Advocacy allows you to advance your coalition’s mission. Examples can include talking to a reporter about your organization's impact in the community, encouraging local civic groups to send volunteers or money to support an effort (e.g., provide funds to support meals for older adults.) It can also mean telling and educating policy makers about your work and sharing your expertise in helpful ways.

Lobbying is communicating with decision makers (elected officials, their staff and voters on ballot measures) about existing or potential legislation and urging a vote for or against. To be considered lobbying, all three components of this definition are required: decision makers, actual legislation AND asking for a vote. Again, working to have your ballot measure placed on the ballot would not in and of itself be considered lobbying, and community members are well within their rights to ask for support of a proposed ballot measure.



3. Building a Senior Levy Coalition



Section overview: Building a senior levy coalition

Structuring a coalition

Set objectives

Create a steering committee

Convening the coalition

Identify & recruit community members

Find common ground

Secure commitments from coalition members

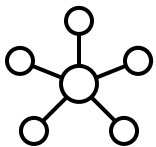
Determine leadership & coalition structure

Assign coalition roles and responsibilities

Conduct a needs assessment

Set goals related to the process of the campaign

Act on your goals



Building an effective coalition

The impetus for exploring a senior levy funds generally comes from one individual who has the energy and drive to improve the lives of older residents. That individual, or champion, takes the next step of contacting a few other community leaders to begin planning a strategy for passage. This coalition is made up of citizens and organizational stakeholders with a shared vision for improved services for older adults. At its simplest, a coalition is an alliance of different parties that work together for a common purpose. Not only are you able to make a larger impact by working within a coalition, but you're also able to leverage each other's strengths to push the issue forward.

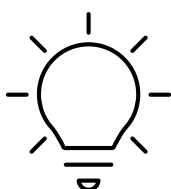
A highly functioning and diverse coalition will show your elected officials, and the public, that community supports your efforts. In most cases, a small steering



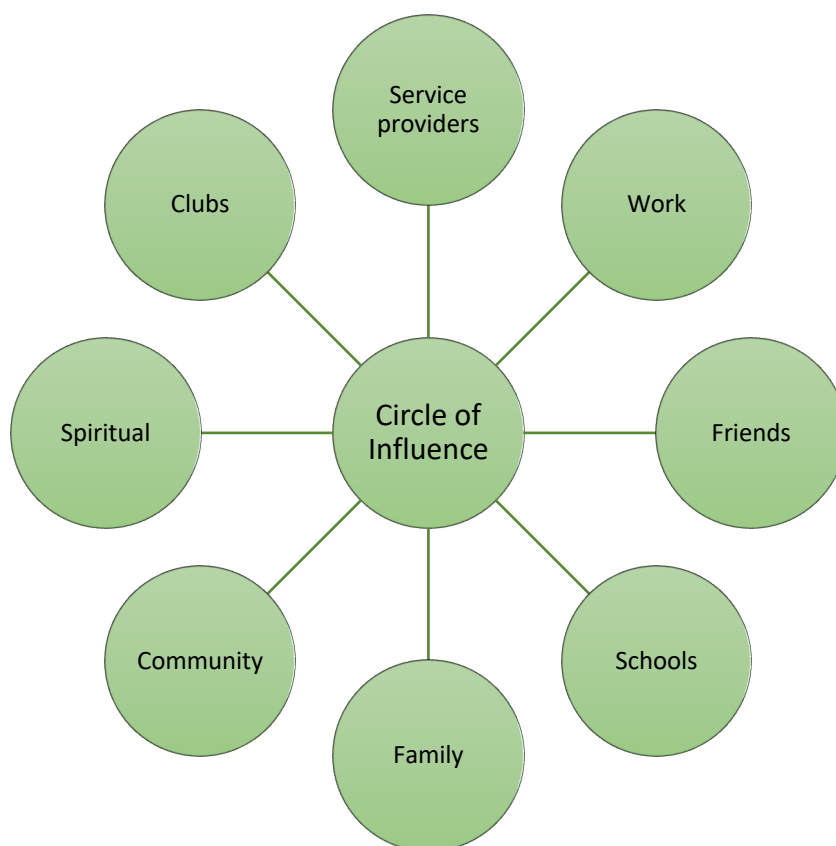
committee, led by a variety of stakeholders who can devote time, to the effort, will ideally drive the effort and manage a broader coalition.

Identify organizations who will benefit from the Senior levy fund, senior centers, and service providers who will be able to contribute to the effort Potential coalition members for senior levies may include:

- Area Agency on Aging directors
- Foundations that support advocacy work, older adults, and or health care or caregivers.
- Physicians and healthcare professionals
- Hospitals and healthcare providers
- Senior Living Facilities
- Chamber of Commerce
- Faith based organizations and religious leaders
- Former elected officials
- Volunteers and individuals
- Political and civic organizations/leaders



Utilize current members' networks to recruit new members. Start by asking them to identify their "circle of influence" and to commit to recruiting others to the effort.





Host a Community Event

Community events, such as a Meet & Greet, county commissioner breakfasts, Lunch and Learns, Town Halls or "state of the community" forums will help get the word out about the need for additional resources for older Missourians.

- 1. The event should be branded as a "Seniors Count" (or another name you have selected for your coalition).*
- 2. The agenda should highlight coalition work and contain educational content about the need in your county, showcase best practices from neighboring communities and provide information about the senior levy.*
- 3. Ensure adequate attendance (more than 30 is ideal) and make sure the room fits the projected attendance, so as not to appear too large.*
- 4. Have a sign in sheet and collect contact information for your records or database.*

Step 1: Structuring a coalition for small, medium or large communities

While there are basics to running a campaign, one-size-fits-all rarely actually fits! While the basic structure of how to run a campaign is constant, the tactics used to connect with voters varies greatly depending on the size and demographics of the region, as well as the political climate and results of previous levy elections. Your campaign coalition will be key in helping determine what strategies are most effective as well as the budget needs of the campaign. A few things to keep in mind:

Smaller county

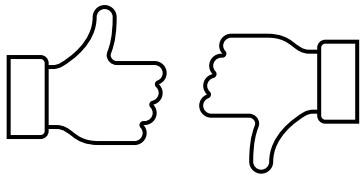
- Smaller communities can be successful assembling an informal working group comprised of providers and community volunteers.
- The lead time for running a successful election in a rural community is probably shorter than in larger areas (12 months versus 18-24 months.)
- In larger geographic areas, it's important to prioritize campaign work in areas with a density of voters. If you have a large area to cover, it's important to get "face time" with



voters by inviting them to house or neighborhood parties or community events, rather than going door to door.

Medium to large county

- Senior Levy Coalitions may operate under a not-for-profit organization that agrees to serve as the fiscal agent.
- Large County may find it necessary to hire a professional campaign consultant to manage the coalition and run the campaign.



A word about political polling

Reaching voters in larger counties is an expensive proposition, in that a successful campaign may require hundreds of thousands of dollars. It also requires a long lead time (18-24 months) to raise funds necessary to mount a successful campaign and reach voters. Polling or surveys can help inform the campaign plan in that it can identify messages that work with specific demographics, such as voters over 65 years of age or voters who are more likely to vote for a tax increase. A poll can also be a first step before investing time and effort in an effort that is unlikely to pass. For example, a poll conducted in Jackson County in 2018 found “soft support” for a senior levy, mostly due to a historically large increase in property taxes that same year. The coalition leaders, including the local foundation that underwrote the expense of the poll, decided to delay their effort.

For instance, a poll might ask which how convincing the following statements are (very, somewhat, not really convincing, not convincing or don't know/no answer)

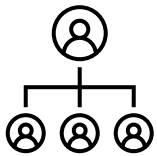
1. A primary goal of a senior citizens services fund is to help older people “age in place” or retire in their home longer.
2. On average, the levy would add less than \$10 to the property tax bill.
3. 55 other counties in the state have a seniors citizens’ fund, our county is missing out on critical resources.





Step 2: Set objectives

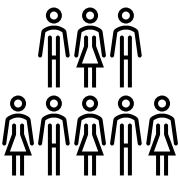
In creating a successful coalition around a policy, such as passing a senior levy, you will need to assess exactly what the needs and policy goals are that would be addressed by passing a senior levy fund in your community. Once on the ballot, voters will want to know how these funds will be used. For example, if a county has a growing population, you might focus on the increasing demands on existing service providers or the waiting lists for services. One senior levy manager advises, “You need a framework for common goals to get people to want to be part of the effort.” You can also share how other senior levy fund counties, especially those close in proximity to your county, have utilized their senior levy funds.



Step 3: Create a steering committee

You will want to assemble a small steering committee of between 3-5 people you can count on and who share your interest in improving the lives of older people and the community. In some rural communities, the committee may be just a few individuals and one community champion. The steering committee will be key in making decisions about campaign strategy, budgeting, and fundraising. Its members will be the drivers behind the effort and pivotal in helping engage a broad coalition. It is important that you secure commitments from steering committee members early on – ensuring they are committed to your objectives, as well as the time and resources needed to be successful in achieving them. For example, members might agree to help organize a speaker’s bureau or host meetings at their offices, or most importantly, agree to provide and help secure funding for the effort.

The steering committee should meet regularly at first and then more frequently as the vote gets closer in the case of improving the health and wellbeing of older adults. If you are a committee of existing agencies, then your approach might take on finding more resources that address the social determinants of health such as food insecurity, transportation or improving housing.



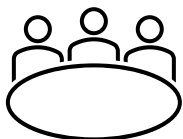
Step 4: Identify and recruit community members

A critical step will be building trust with organizations and associations in your community who are pushing for additional resources for older and vulnerable populations. Long before a measure makes it to the ballot, building a coalition of



individuals and organizations will help guide the campaign.

Coalition members should represent the broader community, including faith leaders, senior living facilities, area agencies on aging and social services agencies, all of whom will be critical in generating volunteers. Depending on the approach, local businesses, associations, institutions, nonprofits, citizens and policymakers can be key allies.



Step 5: Convening the coalition

Once you have a stable committee and diverse membership, the coalition will begin to take shape. Consider establishing a short but descriptive name such as *County Partnership for Older Adults*, *Seniors Count* or *Seniors First*, which will help chart the course ahead. Set regular meetings with your coalition from the start, at a consistent time and place. At first you will probably want to hold monthly coalition meetings to maintain momentum. Nonprofit leaders may be uncomfortable delving into the world of politics, so it will be up to the coalition steering committee to help educate and prepare them to be advocates. Assembling a broad and diverse coalition representing citizens across the spectrum can help to smooth the journey.

Before the meeting begins –

- *Host working meetings only when needed and let your supporters know you will only call on them when you need their help.*
- *Host issue-based meetings and target audiences you hope to attract with specific meeting topics.*
- *Rotate locations around your region and offer folks to join by zoom.*
- *Hold meetings at a time and place that is convenient and comfortable for those attending.*
- *Partner with other local groups to increase the potential for increased attendance.*
- *Identify people with the skills and talents that the coalition needs to achieve its goals.*
- *Don't just recruit people who agree with you. Good work often gets done when a broad range of personalities and skills are at the table.*
- *Make personal outreach to targeted individuals via phone or personal email with specific ask to join meeting.*



During the Meeting

- *Make the meeting as effective as possible. Do your homework beforehand.*
- *Have an agenda and be clear about what information you want to convey and what outcomes you want to achieve. Distribute the agenda in advance of the meeting.*
- *Involve strong facilitators and community leaders to help ensure discussions are rewarding.*
- *Use language, exercises, games, and visuals that will connect with meeting participants.*
- *Provide food, transportation assistance, childcare or other incentives to increase attendance.*
- *Allow time and space for participants to talk with one another and build relationships.*

*** REMEMBER – it's important to keep members always engaged at some level. But keep in mind that individuals don't have to come to every coalition meeting to be engaged. Some coalitions have varying degrees of engagement*

- *Executive committee meets monthly (or more frequently as the campaign nears) to discuss work plans progress and strategies for the campaign.*



Step 6: Find common ground.

Like in any group, it is important to listen to and respect varying opinions. It is important to set ground rules up front, like respecting all opinions and decision-making rules. You will probably not vote, but rely on consensus on a way forward, so it's important to build trust. Having ground rules will make it easier to guide productive discussions. You will invariably have some contentious conversations and disagreements but keep moving forward by finding common ground. For example, you will likely find common ground with decisionmakers around supporting aging adults, but decisionmakers may disagree with your approach simply because it involves a property levy.





Step 7: Secure commitments from coalition members

Long before you are ready to raise campaign funds, you will need to secure resources for activities like community meetings, public education, outreach activities and events, and message development. Members of the coalition should be prepared to commit to the effort, which could last two years or more. To be successful, each coalition member should commit to the following:

- Dedication of time and expertise for strategy development
- Monetary contributions and/or assistance with fundraising
- Contribution of staff time or resources like printing, social media or events that call attention to coalition issues
- Volunteering to support advocacy initiatives
- Willingness to connect the coalition with their network of older adults
- Publicly lending their names to the effort



Step 8: Assign coalition roles and responsibilities

To get things done, you want to have some assigned roles and responsibilities. However, a coalition shouldn't have such a rigid structure that it operates like a business or an association. Cultivating a collaborative environment might include creating breakout work groups where people have an affinity or area of expertise, or a group of individuals who can self-organize.

You also want a diverse set of opinions and viewpoints - and a wide range of experience. Complete the worksheet on the following page for any current and/or potential new members who you would like to engage on your coalition, asking yourself who in your community cares about the issue and how you will engage them.



Worksheet: Coalition Member Engagement

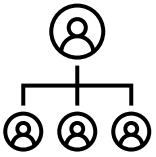
Purpose: Consider how to engage those who are not currently included in your coalition and increase engagement among current members.

Instructions: Complete the worksheet below for any current and/or potential new members who you would like to engage in your coalition. (You can copy and paste the table to fill it out multiple times.) Ask yourself who in your community cares about the issues, and how will you engage them?

Organization or Individual:	
What are their capacities, skills and resources? (e.g., power, time, talent, funding, expertise, connections)	
What is their potential role in the collaboration?	
What is their self-interest? Why should they join? (organizational and/or personal gains)	
What is your motivation to engage them?	
How will you authentically engage them?	
What barriers might exist to engage them?	
Who will approach them, and by when?	

*Adapted from *Coalitions Work* 2007, <http://coalitionswork.com>





Step 9: Determine leadership and coalition structure

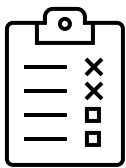
There may be a person in a position of authority, such as the CEO or President of a senior service agency or it may be someone in the community who people respect such as a retired legislator. Leadership could be a person in a position of power and with resources, or people of influence. Coalition leaders should work to keep members engaged and moving forward, to avoid the coalition falling apart as has been the case in a few counties. Another option, which has been used in larger counties including St. Louis, is for the coalition to seek out grant funds to hire a consultant to manage the effort.

"It all really started with one man, who was articulate and well respected. He shopped the idea around to community leaders and took it upon himself to speak out on the need for a fund," - Rural County leader about the success of their senior levy coalition

Sample Coalition Structure



"We simply did not have strong enough leadership and relied too much on one local funder. We did not have a broad enough coalition or funding base and in the end, the effort fizzled." - Community leader



Step 10: Conduct a Needs Assessment

While you can probably rattle off a list of possible uses for revenue aimed at seniors, it is important to conduct a needs assessment for your county. This information will be critical in making your case to voters but more immediately, enlisting community organizations and agencies to support your cause. In short, a needs assessment will help you determine the areas of greatest need and how to anticipate future needs based on things like population growth, demographic changes, and availability of other revenue sources. Different than polling which determines how likely voters would be to approve the ballot initiative in a given election cycle, a needs assessment takes stock of both the assets (existing services) and deficits (not enough resources to fulfill current or future demand.) (See section on polling on page 15).



The process can be in depth, a local foundation or agency might underwrite the cost of an evaluator or researcher to gather population data and conduct focus groups. Or it can involve working with your coalition to gather and compare data about the client base and unmet need. One county, contracted with the University of Missouri to conduct focus groups and hold community listening sessions about where additional resources would be most helpful.

A good place to start is reviewing the census data and consulting the Missouri Senior Report, <http://www.missouriseniorreport.org/> which spells out key indicators by counties including:

- Economic wellbeing (SSI payments as percentage of total income of residents)
- Housing (percentage of senior housing cost burden)
- Health status (hospitalizations and ER visits per 1,000 residents)
- Health care access (primary care physicians per 10,000 seniors)

Demographic indicators include:

- Total population change (measure change over a 10-year period)
- Percentage of the population 65 and older
- Senior owned occupied housing
- Average income of older residents
- Percentage of older people living in poverty

Health and wellness Indicators such as:

- High blood pressure
- Diabetes and obesity
- High cholesterol
- No colonoscopy or monography
- Smoking



Step 11: Set clear goals focused on the process of the campaign

As your coalition has conversations around understanding the issue and developing your strategy, you'll want to have measurable goals towards progress. For example, your steering committee should set fundraising goals along the way and members should agree to both provide financial resources and help raise funds to support the



coalition work. We have included these and other measurable goals in the readiness assessment at the end of the toolkit. Goals might include:

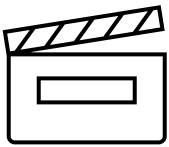
Fundraising a certain dollar amount through agencies, foundations and coalition members

Completing a needs assessment and holding community listening sessions

Settling on campaign talking points and producing a one page handout

Setting a deadline to determine the viability of a campaign and reaching general agreement on when to move forward

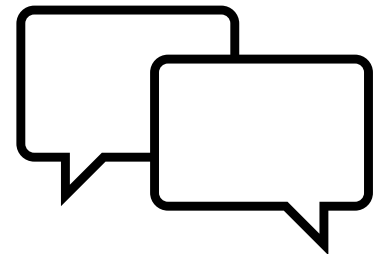
Meeting with your county commissioners to discuss the initiative



Step 12: Act on your goals

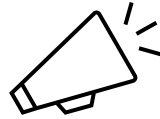
A well thought out strategy with supporting information is key - but if you spend too much time in the deliberation phase and not acting, you will start to lose people. Coalition members must feel like there is forward motion and that the effort is worth their time. As stated above, create working groups within the coalition and allow people to self-organize and report back.

And most importantly.....**Communicate, communicate, communicate.** Make sure that lines of communication within the coalition and among the coalition, the media, and the community are wide open. Open communication will assure that no one feels left out of the loop, and that everyone has the information necessary to make coalition efforts successful. Good communication with the media and the community will increase your chances for publicity and support when you need them.



5 - Transitioning to the campaign

How to Elevate your Message through Effective Communication



Effective communication is critical for any non-profit effort. In today's technology era, it is easier than ever to reach donors, volunteers and allies from across the globe! But ensuring that our message reaches our intended audience – whether that is voters or policymakers – you must take a strategic approach. For example, paying for billboard space might seem like an affordable way to get your message out, but if the billboard is seen by people driving through your county instead of voters, it will be a wasted effort. Follow these steps to build an effective communication plan.

Section overview: Elevating your message
Identify your audience
Get a clear picture of the political landscape
Develop a communication strategy
Understand the political landscape
Develop key messages
Develop educational materials
Get your message out
Create your elevator pitch
Know your basics - and anticipate the opposition
FAQs

Step 1: Identify your audience

For advocates and agencies, decision-makers can be county officials, friends and family, community partners, individual voters, and other advocates like yourself. Audiences will vary in their background, experiences, and knowledge of the issues. You will also have a different goal in mind when communicating with various audiences. It is important that you understand your audience so you can tailor your messaging and your “ask” appropriately.

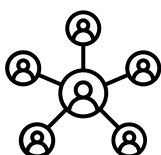


Examples of audiences include:



County Officials (Commissioners, clerks, etc.) – County commissioners or governing bodies will be the ones who must approve the placing of a senior levy on a ballot. They must support your effort, and proactively move to place it on the ballot.

It is important that your **county clerk** have a good understanding of your ballot measure and what you are setting out to achieve prior to placement on the ballot. Open communication on the front end will alleviate problems on the backend. For example, multiple counties have had to return to amend their senior levies due to errors in the ballot language.



Stakeholders – Stakeholders are other community members, or those who interact with your community, who share the common goal of supporting older adults in the community. This list may look similar to your coalition list – or include similar representation. It is important that stakeholders are aligned with your mission and have the education, resources, messaging, and other material necessary to support your advocacy efforts. You may also rely on stakeholders to help you leverage relationships with other audiences.

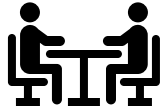


General Public (Voters!) – It is crucial that you effectively message to the general public – so they are aware of senior levies and are ready to take action at the ballot. In order to successfully pass a senior levy, it is important to understand voters, what motivates them, and how to mobilize them.



Media – A strong media strategy is a key element of your campaign plan – but the real work begins way before the measure appears on the ballot. Make sure that the local news outlets know about the issues you are trying to address. Invite them to your events or to tour a senior living facility. Get further tips on how to write a letter to the editor and media advisory in the following chapter. Connect with voters through media that's important to your county, including newspapers, talk radio, community newsletters, church newsletters, etc. A sample newspaper advertisement can be found in the appendix.





Communication Tool: One on ones

A one on one is an individual conversation between yourself and an individual who has potential to contribute to your campaign. Sometimes planned but often spontaneous, they happen in person or via phone. Here are a few tips: (source: Working Partnerships USA)

1. Assume support: Assume that this leader wants to be involved and you just have to find the right opportunity.
2. Set the tone: your energy level, posture and body language, eye contact sets the tone for the interaction.
3. Make a direct ask for their support and tell them what you need (money, their name, to join the coalition, to speak at an event etc.)
4. Ask follow up questions: if someone gives you a one-line answer probe deeper.
5. Don't take no: Unless you understand the barrier and can't solve it. Assure them you will help them prepare for their role.
6. Have a fallback ask: If they can't commit to you ask what else can they do. For example, if they can't write a financial contribution can they lend their name to the list of supporters?
7. Make the ASK failproof: start with a small ask, then build upon that accomplishment with more significant tasks or projects.
8. Follow up
 - a. keep track of commitments made
 - b. enter the contact into your database
 - c. thank them and confirm their commitment in writing

Step 2: Get a Clear Picture of the Political Process

Again, the governing body of any county (or city within a county) has the statutory authority to place the initiative on the ballot. It is therefore critical to understand the process. Attend county governing body (county commission, county council or legislature) meetings. Listen to the kinds of questions officials ask and the issues they take most seriously. By understanding



their general concerns, you'll be able to craft your arguments accordingly. You will also need to learn the political landscape and understand the context in which you will be seeking voter approval to levy a new tax.

Step 3: Develop a communication strategy

A key to passing any law is building public support for your cause. The better the public understands the issues the greater likelihood that you achieve your public policy goals – and pass that senior levy! Once the coalition selects an organizational name and direction, consider creating a simple website, and if appropriate a Facebook page. Later on, you will need a strategy to support election activities (see campaign plan section.)

Step 5: Develop key message points or “sound bites”

Successful local ballot measures require a strategy that anticipates questions voters will have and amplify that message. Sometimes referred to as “sound bites,” points like these will help make your point, and can focus on various aspects of your arguments in support of a levy.

Return on Investment

It costs up to five times as much to live in a nursing home than it does to provide the help that enables older adults to remain in their home or in senior living communities. Supporting independent living services makes good economic sense, as it helps pay for seniors to live independently.

The need

Despite existing programs like Meals on Wheels, about 40% of older residents struggle with nutritional issues. The levy could provide healthy meals to XX of our residents.

Growing aging population

Our county population continues to increase; we estimate that people living in the county 65 or older will be XX% by the year 2030. OR having a fund of this sort will attract people to our county.

Neighboring counties participating

More than half of all Missouri counties have adopted a senior levy including LIST NEIGHBORING COUNTIES. These counties have more resources to address issues of common concern to our aging communities.

Local dollars

Every dollar from this levy will stay in our community

Confidence in local leadership

On average, the levy would add less than \$10 to your property tax bill

Economic security

This fund will provide resources for our older residents that are experiencing economic insecurity



Step 6: Develop educational materials

It is important to have a variety of educational materials ready for your various audiences. Examples of educational materials can include handouts, one-pagers, FAQs, etc. These should be tailored to your various audiences, and available to have as reference materials.



Tips for developing educational materials

Keep it simple - no more than three key points

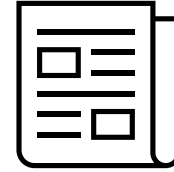
Provide impactful numbers and data such as community statistics, program participation numbers or demographics

Use visuals or infographics in written materials.

Tell stories that have impact.



SAMPLE EDITORIAL



Tax-weary voters need assurance of accountability for seniors' tax

By the Editorial Board May 10, 2016 (St. Louis Today)

Striking statistics about the graying of America include data showing that 10,000 people turn 65 every day, and that the St. Louis area is home to the eighth highest percentage of older people in the country.

Finding ways for the aging population to continue living and thriving in the region has acquired some urgency as statisticians look down the road and forecast that a quarter of the population will be 65 or older by 2045.

These seniors will mostly be baby boomers, and they will be looking for affordable access to transportation, health care and housing. Many, if not most, will be living on fixed incomes. Economic security will be among their top concerns.

A glimpse of the future challenges can be found in a Brooklyn, N.Y., assisted-living facility whose owner is trying to close it down. Five women, ages 91 to 101, refuse to leave. Where are they supposed to go?

Advocates for the aged and disabled are worried about what they say is a growing national trend of nursing homes turning to eviction to get rid of challenging residents, mostly the poor and those suffering from dementia.

It's no wonder would-be seniors are worried. Their plates full of economic uncertainty and unstable living conditions, with side dishes of health care worries and fears of descent into isolation. And most of them will be living longer, too. Welcome to the myth of the golden years.

Communities are trying to get a grip on solutions to help vulnerable seniors continue to live at home as they age, while maintaining access to affordable transportation, reliable health care and nutritious food.

Efforts are underway to get a senior-services property tax increase on the ballot for St. Louis city and St. Charles County. The initiative, Seniors

Count, would collect 5 cents for every \$100 of assessed valuation. It already will be on the November ballot for St. Louis County.

The initiative is the result of a 1990 state law allowing voters in each of Missouri's 114 counties to vote on the tax. Jamie Opsal, program manager with Seniors Count of St. Louis, which is backing the tax increase, says the tax has been approved in 51 counties, none in the St. Louis area.

Opsal has said the tax would generate more than \$11 million a year in St. Louis County and be used for programs that help older residents, such as Meals on Wheels.

This is similar to the Children's Service Fund, approved by voters in St. Louis County more than a decade ago and generating about \$40 million a year. Questions have arisen over the years about how that fund is managed, and how the revenue is used.

No matter how worthy this cause, voters are tax weary. As the election nears, senior advocates must offer a strong case, plus assurances of full public accountability.



Step 8: Create your elevator pitch

The elevator Speech is a message intended to spur decision makers into action, all in the time it takes to ride down an elevator.

An elevator speech will be:

Short - 30-60 seconds – that’s 75-150 words max!

Specific - focus on a few key points

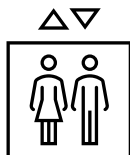
Authentic – Drawing on real life examples and shared experiences

Actionable– Include an “ask” which requires an action for the listener to take

Memorable – Share impactful stories and numbers to make a lasting impact

X Don’t ramble – be respectful of the limited time

X Don’t use too much jargon – be sure you use “layman’s” terms



Sample Elevator Pitch

Hello, I'm _____. I'm here to talk about Proposition X on the November ballot. It's important because it's all about supporting our older community members.

As our community ages, our seniors need more help to stay healthy and live independently. Some of them don't have enough food, and others need extra medical care to keep living at home.

I'm saying "yes" to Prop X because it'll bring in money that'll be used right here to help our seniors. We're a community that cares for one another, and that's why I'm all for Prop X. I hope you'll consider voting "yes" too!

Step 9: Know your basics and anticipate the opposition

It is critical that you rehearse and memorize elevator speech so it's always ready to go. You never know when you'll have the opportunity to use it – from standing in line in the hardware store to a formal meeting with an elected official. It is good to have a few versions of the same speech ready, so you can quickly shift gears to address the audience in front of you.



Opposition

Possible Response

Property taxes are regressive and place a financial burden on those living on a fixed income.

The state and national governments should fund programs for older adults instead of asking local tax payers to increase taxes

Helping older people is worthwhile, but property taxes are already too high. This measure will hurt our economy.

Investing in seniors might be important, but this measure might leave less funding for other county needs like law enforcement, education, jails and roads.

Families should be responsible for taking care of their own elderly family members and not expect the taxpayers to support them.

The Missouri Property Tax Credit gives credit to low income seniors and 100 percent of disabled people for taxes paid for the year. Many older residents, those living in nursing homes and senior living do not pay property tax.

While we do receive funding, it simply is not enough to cover the needs of our community. We take care of our own.

This is an investment into caring for those in our communities. Older adults are entitled to age with dignity. By supporting older adults in our community, we help keep down costs associated with hospital visits, nursing homes, and more

This is a standalone fee on property that is required to be spent on services for older adults. It completely separate from - and does not compete with - other county funds.

Unfortunately, many older adults are left without family or resources to care for them. Further, older adults who live in their homes continue to contribute to property and sales tax for the county.

Frequently Asked Questions



Where will the money come from? A property tax of five cents per \$100

How much will the tax cost me? A taxpayer with a home valued at \$100,000 would pay \$9.50 annually in real property tax. A taxpayer with an automobile valued at \$10,000 would pay \$1.67 annually in personal property tax.

How might the funds be used? Funds would be used to aid services that allow a person aged 60 and over to age in place.

Who is eligible for funding? Senior service providers for residents age 60+ in each county (or the city of St. Louis) that passes the tax.

Is it only for low-income people? No. Some services would be based on need, but others will be available to all older adults aged 60 and older.

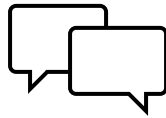
How is the money distributed? Each county selects a board that decides where the money goes.

What happens if the Proposition doesn't pass in my county? Funding gaps will continue, creating a lack of services to seniors who need them to stay in their homes.

When would the services begin? If Proposition XX passes in passes in November xx, services could begin in early xx (18 months later).



4 – Communicating with Elected Officials



The statute for adopting a senior levy allows the governing body of any county (or city not within a county) to levy and collect a tax on real and personal property, upon passage of a ballot initiative. The statute also provides a framework for county election authorities to put the question to a vote, which generally requires the local county authority to pass an ordinance referring the question for a ballot. It is important to communicate with your officials so they know how to take action or support your issue. Often a good place to start, is communicating with officials you know or who you believe or know are supportive of your cause.

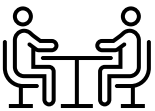
Section overview: Communicating with elected officials

Meeting with your elected officials (in-person)

Writing to your elected official

Phoning your county official

Meeting with your elected officials (in-person)



A personal visit generally has more immediate impact and leaves a longer impression than a letter. While county officials in larger counties may have staff, it is more likely that county officials maintain their own calendars.

You can also invite officials to events in your community or to your office so that they can see firsthand what you do. Officials enjoy making these visits because it's an opportunity for their own constituent relation efforts.

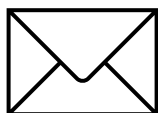
Additional Tips for in-person communication with Elected Officials

- Bring a one-page handout to leave behind about your request.
- Prepare two or three communication points you want to convey
- Make a list of questions you anticipate will be asked and be prepared to use those questions to launch your points. Develop at least one answer you can give in 20 seconds or less.

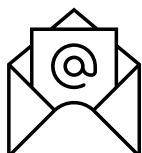


- Share a story of a local person or effort that illustrates the need.
- Have an agenda so that you don't just chat until the clock runs out.
- Volunteer yourself as a source of local expertise on issues of importance to older residents and the community in general.
- Be a good listener, even if the official disagrees with aspects of your position.
- Always follow up with a personal thank you note that restates your request.

Writing a letter to your county official

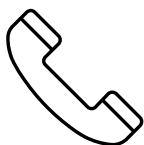


- Mention the name of your organization in the first sentence.
- State that you support the ordinance in the second sentence.
- Keep it short; no longer than one page.
- Explain how the levy will affect you and the older residents
- Sum up your arguments and supporting data.
- Honesty and accuracy are premium; do not exaggerate.
- Be clear by using layman's language.
- Avoid form letters; they receive less attention than personal letters.
- Include a return address prominently at the top of the letter. *(see sample letter at the end of this section)*
- Follow up



Emails are acceptable forms of communicating with elected officials. Electronic communications should follow the same rules and be as well written as a mailed letter.

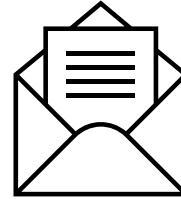
Phoning your county official



Elected officials give serious attention to telephone calls from constituents, especially in smaller counties. Most elected officials include their personal phone number in their materials or website. If you call, identify yourself and be sure you can express your points concisely. Be sure to refer to the talking points, but speak in your own words. As in above, be sure to follow up with a personal thank you and restate your request.



Sample Letter to an Elected Official



01/01/2023 [date]

The Honorable (name)

The (County Name) Commission (or Legislature)

County Address

FIRST PARAGRAPH - I am writing to you to ask your support in the adoption of a Senior Levy Fund in (COUNTY NAME.) As (your position) I work with older residents every day.

SECOND PARAGRAPH – Briefly, concisely explain your position – why it is important to you and how you’re effected by the proposed levy. *This issue is important to me because the number of seniors is projected to grow exponentially in the next ten years. As an advocate, I can tell you that we are nearing a crisis point. Every day, we see older residents struggling to get the health care and services they need, including meal delivery. Given the rural nature of our county, many seniors are isolated and homebound, with no family to care for them.*

THIRD PARAGRAPH – Briefly provide salient facts about the needs of older adults in your county. *Adoption of a senior levy fund would help protect and support our older residents. Neighboring counties including XX and XX, have been able to provide critical care and support for their residents thanks to the adoption of the senior levy. For example, COUNTY NAME collected AMOUNT which went to support meal delivery to XX people, more than XX shingles vaccinations and grants provide support that enable older residents to age in place such as home maintenance, repairs and other resources to reduce housing-related expenses such as weatherization.*

FOURTH PARAGRAPH – Thank the official for considering your position and offer to provide further information.

SIGNATURE BLOCK



5 – The Campaign Plan



While every campaign comes with unknown variables, the better you plan the better prepared you'll be to manage what lies ahead. A written campaign plan is a detailed document that serves as your campaign roadmap to getting your ballot initiative across the finish line. The plan should address questions that will come up during the race such as:

- What is my key message?
- What does a winning budget look like?
- How much money do we need to raise and how will we raise it?

Section overview: The campaign plan

Message

Setting a vote goal

Targeted messaging

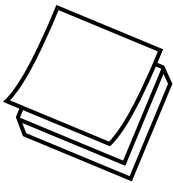
Budget & fundraising

Volunteer recruitment & management

Media & communication

Campaign timeline

Components of a Campaign Plan

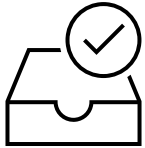


Message All issue campaigns benefit by having a strategy that provides everyone in the coalition with a consistent position statement. As mentioned in the previous chapter, it does not need to be memorized but should provide the core concepts and talking points to serve as a guide to your spokespeople and volunteers. A good message platform includes these points:

- Explanation of the problem/need that currently exists, what you are trying to change, and how it solves the problem
- What the campaign is working to accomplish



- Description of how a successful campaign will address the need, e.g. adopt a property tax levy, along with specific actions that voters need to take e.g. vote on November XX.



Vote Goal - Look at past voter turnout to get a sense of how many votes will be needed to win the election. You can calculate the average voter turnout across the past three similar elections to find your number. To account for margins of error, set your goal for 52 percent of the expected vote. Remember to look at current voter registration and residential trends in your county - perhaps registration grew due to a local issue or housing boom.

Multiply the voter turnout percentage in the most recent similar election by the current number of registered voters to predict likely turnout. then multiply by 0.52 to determine how many votes you will need to safely win by a 52% margin. Consider voter trajectories as well, including, population growth, shifts in demographics, etc.

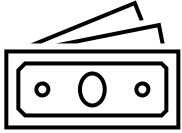
NOTE: go to www.sos.mo.gov/elections to look up voter turnout in your county. Be sure to use similar elections - e.g. a general election in a presidential year will have much larger turnout than a municipal election in an off year.

100,000 (Anticipated Voter Turnout)
 X 0.52 (Minimum Vote Goal)
= 52,000 Votes Needed to Win



Targeting - Once you determine how many votes you need to win, you need to determine who you need to communicate with to win the race. Who is your natural base and who should you persuade to vote in support of the initiative? Because you can't speak directly to every voter, you'll need a solid strategy about how you use your resources to mobilize your base. Targeting will help identify areas of your community and network that will require the most door knocking and calling. Determine which supporters may need an extra push to get to the polls on election day or to vote early. Successfully Senior Levy Campaigns have relied on the fact that older voters have the highest turnout - and have messaged accordingly.





Budget and Fundraising - Keeping an account for both intake and expenses is critical in campaigns, as knowing what you are spending will help you maximize resources. Fundraising goals should be linked directly to the campaign budget. The majority of your budget should go to direct voter contact (field, direct mail, digital advertising, phones and in some larger communities, radio and television advertising.) Maintain an idea on what the necessities v “nice-to-haves” are so that you find yourself with less than you hoped for in the bank, you know where to cut first. Likewise, keep a wish-list handy should additional funds become available.

NOTE: All campaign expenditures and donations must be reported to the Missouri Ethics Commission. This is the primary function of the campaign treasurer. Also, Missouri voting laws change regularly, and this site will help you keep up with the changes. See this link for additional information and training: <https://www.mec.mo.gov/>



Field - Volunteer Recruitment & Management - A strong field plan, or how you will talk directly to voters leading up to election day, is critical.

- How many doors do you want to knock on or phone calls can you make?
- How many volunteers do you need each weekend to hit your goals?
- Do you have funds to hire a volunteer coordinator or will a partner agency provide support for this role?
- Do you have a script for volunteers to use and how might it change throughout the course of the campaign?





Tip! Managing & engaging your coalition & supporters

Creating and managing your coalition members and supports is an important step of keeping track of your supporters and potential volunteers. Early on, start by creating a simple spreadsheet in one place – Google Docs, Excel, Constant Contact, and task someone with updating it after community meetings etc. As time goes by the database will grow.

1. **Keep building your “master” list.** add new people as you get signup sheets or have one on one conversations
2. **Communicate with your list.** Ideally, everyone will get an email from you/coalition leaders once per month, more frequently as the election date nears.
3. **Segment your list.** Create an overall or “master list” but also segment the list by activity or interest. You can create three segments to start: one for coalition partners, one for core supporters (individuals and potential volunteers) and one for community influencers such as elected officials and donors.
4. **Update and refine to track activity.** Move people into segmented lists as they show more interest and become more active. A good list will show you what is and isn’t working in your coalition and highlight areas where you need to build support (such as volunteers.)

Tips for formatting your master list

- make sure every field is titled and that they are uniform (don’t put a phone number in the email field.) If you don’t have information (such as an email address, leave it blank)
- use separate fields for first and last names. The same applies for addresses, have one field for street address and another for city etc.
- keep a current list and create a process for updating it frequently.
- when you create a sign-in sheet at community meetings, make sure that the forms ask the same data your list does. This way, you can add people to your master list without moving columns around.
- Create fields (such as the ones listed below of activity level, special skills) or note if they volunteer for campaign work. Keep it simple and consistent. If this does not apply to an individual, leave it blank.

Supporter List Template

Our Coalition Name

First Name	Last Name	Street Address 1	City	Zip	E-mail	Phone	Activity Level	Special Skills	Activities completed
							1- General supporter 2-Taken one action 3-Active volunteer	e.g. graphic design lawyer public speaking	e.g. LTEs Op-Eds Phone bank
Jane	Sample	123 Main Street	Madison	53705	j.sample@gmail.com	608-555-1234	2	accounting	testified at 1-23-12 event

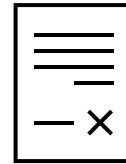




Media and Communication - Outline how you will spend your budget on paid communication tactics as well as free media. There is no one-size-fits-all – rather there are a combination of tactics to reach voters with your message.

- Website
- Direct Mailing
- Digital Advertising (Facebook and social media)
- Text Messaging
- Social Media (message shared by coalition member agencies)
- Yard Signs and Billboards
- Paid and Earned Media

Getting on the Ballot



Determine the optimal election date for the initiative.

Send a letter to the county commission requesting ballot placement* – provide sample language from the statute to the commission/county clerk.

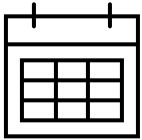
Using an official name of the effort - form a campaign committee:

- identify a campaign treasurer
- Request an EIN/Tax ID number from the IRS
- Open a bank account using the committee name – using the treasurer and if possible an assistant treasurer.

Set up a reporting structure for all campaign related expenditures and contributions

- Take the tutorials on the MEC website and follow the deadlines closely. (NOTE: elections laws change frequently in Missouri. The MEC website has the best and most up to date information.)
- Register the committee with the Missouri Secretary of State – Missouri Ethics Commission.
- You may also register the committee with your local election authority (they will forward the paperwork onto the MEC)





Timeline

Months 1 - 12 Campaign Coalition Building

- Identify group of 3-5 individuals for a steering committee
- Organize broader coalition meetings – meet monthly, create task forces
- Fundraise for general education effort
- Engage with local elected officials
- Conduct research on ballot placement and timing
- Conduct research on need (community survey, conduct poll or listening sessions)
- Execute communication and outreach strategy as outlined previously

Month 13

- File committee with County Election Board
- Discussions with major donors
- Name a treasurer – will be responsible for compliance/reporting. Must be a county resident.
- Open a bank account
- File the committee with the Missouri Ethics Commission (MEC)
- Execute outreach plan to county senior groups, civic organizations and political clubs
- Form a speaker’s bureau and train on messaging
- Create a communication plan (talking points, benefits, costs, testimonials)
- Coalition continues to meet

Months 14 & 15

- Launch campaign webpage
- Meet with potential donors/funders
- Hire designer/communication firm or identify in-kind communications professional – photo shoots for mail pieces
- Update handouts/one pagers to include election date
- Speakers’ bureau – recruit and train volunteers
- Purchase or obtain voter file for targeting mail, door knocking etc. (based on “win” number)
- Coalition continues to meet



Month 16

- Begin social media posts/boosts/ads
- seek endorsements from political and civic organizations (chamber etc.)
- Volunteer phone bank and door to door canvassing
- Earned media events – community forums at senior centers etc
- Meet with editorial board of local paper
- Consider voter registration drive in senior centers (reminder to check to see you are still registered and if they have corrected address etc.)
- Coalition meets more frequently – includes volunteer training
- Print yard signs and identify location (bill boards if needed)

Month 17

- Social media posts/ads/boosts on Facebook
- Continue to collect campaign donations
- Target communication to absentee and early voters (watch for changing election laws)
- Volunteer canvass (door to door)
- Speakers' bureau
- Earned media (editorials, letters to the editor)
- Get out the Vote Events and Rally
- 1 or 2 pieces of mail to targeted voters (depending on budget)
- Place yard signs and billboards
- Coalition meetings weekly

Month 18 Election Month

- Identify polling places and volunteer needs
- Last minute funding pitch
- Phone banking
- Volunteer canvass at polling places
- Visibility and media interviews
- Provide rides and outreach to older voters



6 – Paying for the Effort



All of the efforts leading up to ballot placement are done so in the name of public education. But once the county authority formally places the question on the ballot – your effort will switch into campaign mode. Meaning, you will need to establish a formal campaign committee, set a campaign budget, and bank account reserved for the sole purpose of conducting campaign activities.

Section overview: Paying for the effort

Fundraising

Setting expenditures

Reporting

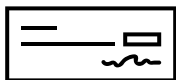
Phase One - First 12-15 months

Phase Two - Final 3 months

Active Campaign and Election

Public Awareness/Education and Coalition building

Fundraising



Every campaign is different but it's best to plan for a minimum of 12 – 18 months from coalition formation to election date. Most of that time will be spent on public engagement and raising awareness about the need for additional resources to address the growing senior population. As discussed previously, the coalition operates as an informal affiliation of community-based organizations and individuals working together to get a senior levy passed.



Typically, one or two nonprofit agencies will take the lead in organizing and supporting public education efforts, often providing in-kind staff support to the effort. You will need to set aside funds for public education. In some cases, coalitions find a partner agency to serve as a fiscal agent, which will be helpful if you are applying for a grant.

Examples of fundraising initiatives might include:

- Applying for private advocacy grants
- Fundraising in your local community to raise awareness about the needs of older residents
 - Coalition members each contribute funds to get the effort started

Separating Expenditures



Public Education: As discussed previously, much of the work the coalition does can be paid for well in advance of creating a campaign. These are expenditures for materials and efforts that make not mention of the election or attempt to engage voters. Examples of public education expenses might include:

- Printing handouts to help in educating the public and county officials on issues impacting seniors and older adults
- Travelling to stakeholder meetings to talk about issues impacting seniors and older adults
- Administrative support for coalition meetings, follow up, etc.
- Hiring a communications and messaging team
- Polling or research about the need or receptivity to a ballot initiative



Campaign Expenditures: These are expenditures that occur once the campaign gets underway and that directly relates the election. Examples of campaign expenditures might include:

- Communications that ask the voter to approve or vote yes on the ballot initiative including bill boards, yard signs, mailers, advertisements and electronic ads.
- Hiring a campaign consultant to manage the campaign and help fundraise
- Paying workers to go door to door or to canvass



- Remember: printed material must list the name of the effort and the name of the treasurer (see campaign plan)



Reporting

The Missouri Ethics Commission (MEC) spells out the steps to be taken to establish a campaign committee and how to report contributions and expenses. You will also need to identify a campaign treasurer who will oversee the finances, file reports with the MEC, and assure that your campaign complies with election laws. For example, all campaign related material must carry a disclaimer e.g. “Paid for by the Seniors Count, Jill Smith, Treasurer.”

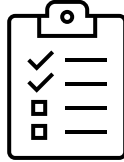
Training and technical assistance are available on their website:

<https://www.mec.mo.gov/>



7 –Ready. Set. Run!

Take the Readiness Assessment



Now that you have reviewed the tool kit – it is time to take stock of how ready your county is to proceed with putting a levy issue on the ballot. This check list will help to determine if you are ready to run!

Identify a leadership team

- Have you identified needs of your older residents and articulated a need for additional resources?
- Do you have 3-5 likeminded leaders who will make an 18-month commitment to bringing the Levy forward?
- Are you meeting regularly and have a schedule that works?

Assemble a Coalition

- Have you reached out to key constituents and potential allies?
 - Senior living facilities
 - Advocacy organizations
 - Faith based and civic leadership
 - Area Agency on Aging
 - Hospitals and healthcare
 - Community leaders
 - Chambers of commerce
- Have you approached key organizations in your community about making a commitment of resources?
- Has the coalition met regularly to hammer out issues and discuss potential strategy?

Communication and Engagement Plans

- Have you created a sound message for rationale on bringing forth a ballot initiative?
- Have you created a budget and plan for public engagement over the next 18 months?



Do your research

- Conduct a needs assessment of older residents, determine top three needs
- Conduct a needs assessment of your key partners – what services are currently offered and where is there a deficit?
- Contact the assessor’s office to get the current levy rate and tax collection information to determine how much can be raised through the levy.

Do you have a grasp of the political landscape?

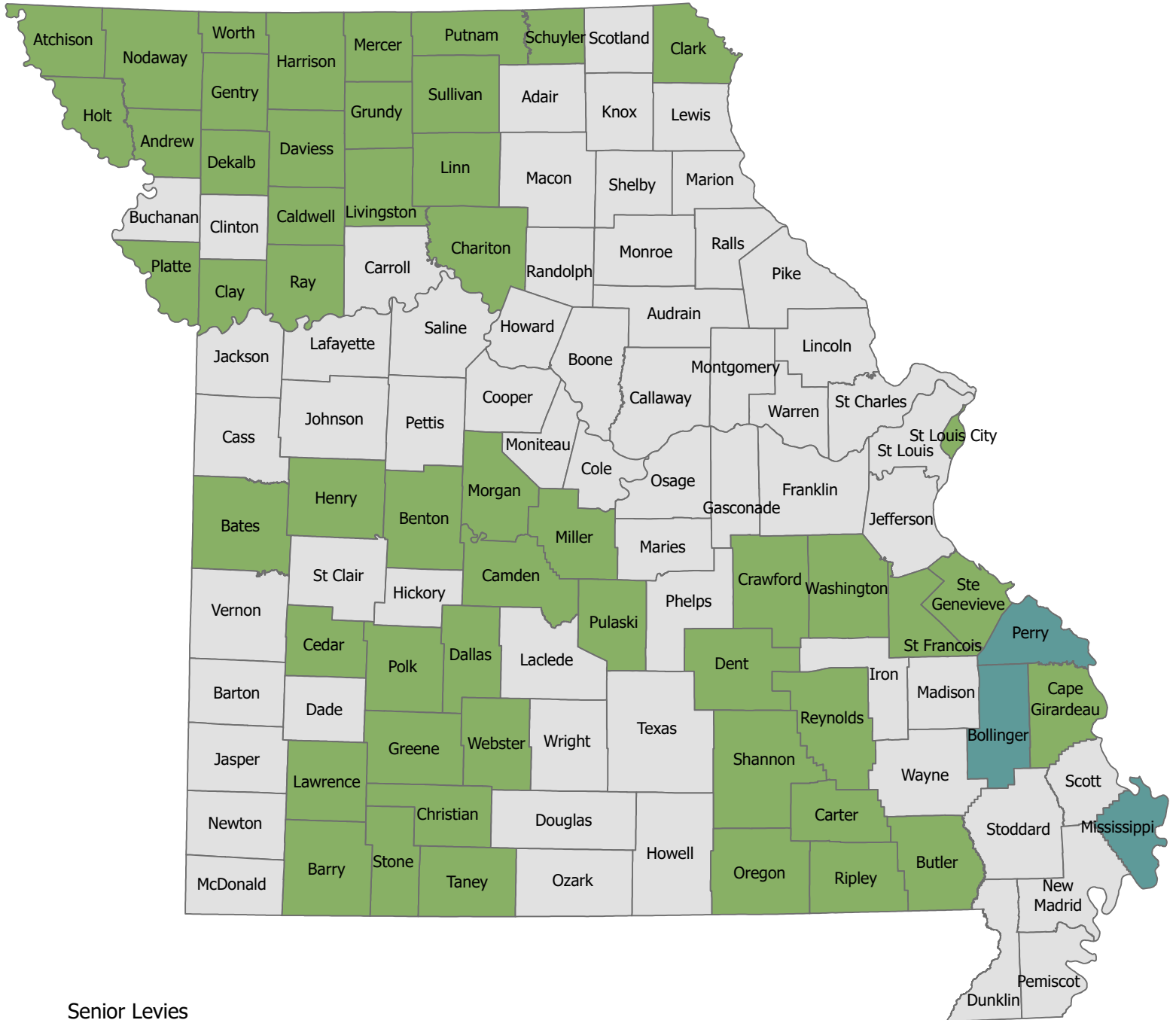
- sketch out a timeline for elections over the next three years.
- review the results from the last three elections to determine voter turnout and patterns (paying attention to differences in the general election, primaries and local)
- regularly attend county commission meetings and get to know local elected officials.

Determine your strategy

- Timing: Research last three-year election cycles to determine optimal ballot placement
- Budget: Set a budget for the campaign and public education efforts leading up to the election
- Calculated your “win” number e.g. number of votes needed for passage



Missouri Counties with Senior Levies



Senior Levies

- Counties with Senior Levy Funds
- Counties with Senior Levy Funds funded by Sales Tax
- No Senior Levy

Senior Citizens Services Fund for Buchanan County

***Buchanan County Ranks 97th of 114 Missouri
Counties for Quality of Life Issues for Seniors.***

Your **YES** Vote for Seniors can help provide...

- Affordable transportation to medical appointments
- Assistance with shopping for food or personal care
- Improved senior centers
- Improved meals on wheels services
- Counseling services for seniors and their family caregivers
- Guidance for family caregivers

For more information go to www.savingseniors.com

**VOTE
YES** 

**SENIOR CITIZENS
SERVICES FUND**

AUGUST 5, 2008

Paid for by Buchanan County Advocates for 60+ Adults
John Wilson, Treasurer

Letter To Commissioners to Put Levy on Ballot

To. Putnam County Commission
Court House
Unionville Mo. 63565

This is a request to have a levy of 5 cents per each one hundred dollars assessed valuation, for a "Senior Citizens Fund Tax" upon the November 5th ballot. All funds collected for this purpose shall be deposited in a special fund for the provision of services for persons sixty years of age or older, and shall be used for no other purpose except those purposes authorized in sections 67.990 to 67.995.

The purpose of the "Senior Citizens Services Fund Tax" is to enhance services for our senior citizens by providing funds for programs which will improve the health, nutrition, and quality of life of persons who are sixty years of age or older.

If the voters of Putnam County should approve said levy, you the County Commission would then appoint a board of directors. Deposits in the fund would be expended only upon approval of the board and only in accordance with the fund budget approved by the County Commission.

The Official Ballot should read:

Shall Putnam County levy a tax of 5 cents per
each

One hundred dollars assessed valuation for the purpose of
providing services to persons sixty years of age or older?

_____ YES

_____ NO