Financing Livable Communities By Ballot: Challenges and Opportunities

AARP 2018 Livable Communities Conference
Charlotte, NC
November 14, 2018
Session Overview

- Discuss growing interest from state offices in supporting ballot initiatives that provide funding for livable community projects.
- Hear from AARP state office colleagues about their work to support these initiatives, and important lessons learned about what worked, what did not, and how their experiences might help other colleagues be successful.
- Review new AARP research about the factors that drove voters in Nashville, TN and other localities to either support or oppose the city’s ballot for comprehensive transportation. And, most importantly, what these finding may mean for other state offices engaging in these initiatives.
From the Statehouse to City Hall: Marion County Transit Referendum

Mandla Moyo
Director of Community Engagement
“To serve, not to be served.”
– Dr. Ethel Percy Andrus

Caregiving
Financial Security
Fraud Protection
Livable Communities
Marion County
2016
Ballot Measure
BALLOT MEASURE

DIGEST: imposes an additional local income tax rate for a public transportation project as authorized by the voters' approval of a local public question on November 8, 2016

SOURCE:
Initiated by: Councillor Lewis
Drafted by: Fred Biesecker, General Counsel

LEGAL REQUIREMENTS FOR ADOPTION:
Published Notice of Public Hearing
Subject to approval or veto by Mayor

PROPOSED EFFECTIVE DATE:
Adoption and approvals

GENERAL COUNSEL APPROVAL: ___________________________ Date: January 5, 2017

CITY-COUNTY FISCAL ORDINANCE NO. 1, 2017

PROPOSAL FOR A FISCAL ORDINANCE to impose an additional local income tax rate for a public transportation project as authorized by the voters' approval of a local public question on November 8, 2016.

WHEREAS, Senate Enrolled Act 176 (2014) enacted by the Indiana General Assembly provided an opportunity for the citizens of Marion County to vote by referendum in a general election on whether to fund county-based public transportation improvements through a local income tax not to exceed 0.25 percent; and

WHEREAS, pursuant to IC 6-25-2-1, the city-county council authorized a referendum to fund public transportation improvements to be placed on the November 2016 general election ballot for Marion County voters; and

WHEREAS, pursuant to IC 8-25-2-3, the referendum question was as follows: "Shall Marion County have the ability to impose a county economic development income tax rate, not to exceed a rate of 0.25%, to pay for improving or establishing public transportation service in the county through a public transportation project that will create a connected network of buses and rapid transit lines; increase service frequency; extend operational hours; and implement three new rapid transit lines?"; and
So What Did We GET?
THE MARION COUNTY TRANSIT PLAN

LOCAL ROUTE IMPROVEMENTS

3 times a year IndyGo makes route improvements to build a strong network of frequent service that is more user-friendly.

Show More

LEARN MORE

BUS RAPID TRANSIT

Bus Rapid Transit (BRT) provides fast, comfortable, and frequent transit service. Current and future IndyGo riders.

Show More

LEARN MORE

RED LINE

The Red Line will run from Broad Ripple through downtown Indy to the University of Indianapolis, connecting

Show More

LEARN MORE

PURPLE LINE

The 14.8 mile Purple Line will connect two separate municipalities within Marion County – the City of Indianapolis.

Show More

BLUE LINE

The 20 Mile Blue Line Rapid Transit Line will travel along Washington Street from Cumberland west to the Airport.

Show More

SUPER STOPS

The upgraded bus stops will include near-level boarding, real-time arrival information, lighting, and covered

Show More
Who Else Cared?
About Transit Drives Indy

The Transit Drives Indy (TDI) Coalition, comprised of organizations across Marion County, seeks to educate voters in Marion County on the benefits of public transportation and advocate in support of the Marion County Transit referendum.
Who Didn’t Care?
Opposition to the Referendum

But opponents weren't buying it the plan.

"The operation and management of IndyGo over the years, gives me no confidence that extra funding will bring many improvements, if any," said one man.

"I'm not opposed to the transit tax but how it's spent," said Lee Lang.

She told committee members she doesn't want any money going to the Red Line, which will run from Broad Ripple to the University of Indianapolis. She said she and several other business owners worry about the part of the route planned for College Avenue. They fear the impact on traffic and parking along the already-congested corridor.

Dave Harmless spoke out against the tax itself. "There you are forcing me to pay for something I don't use and don't plan on using," he said.

Republican Jeff Coats, who said his district won't see any new routes under the plan, voted no.

STORY CONTINUES BELOW

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What Did We Learn?
Coalitions are NOT all built equally

Be sure everyone has a seat at the table

Be aware of opposition & acknowledge concerns

To PAC or NOT to PAC

Use your NATIONAL team Resources

Build YOUR team
TEAM Work makes the Dream Work

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Questions?

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Montana’s Initiative 185 Information

<table>
<thead>
<tr>
<th>Goals</th>
<th>Organizational Considerations &amp; Environmental Scan</th>
<th>Allies, Constituents and Opponents</th>
<th>Targets</th>
<th>Messages</th>
<th>Tactics</th>
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<td><strong>Long-term Goal:</strong></td>
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<td>Registered Montana voters, specifically in</td>
<td>“Helps ensure a healthy &amp; productive workforce, creates thousands of jobs for nurses &amp; other medical staff, &amp; helps our rural hospitals stay open &amp; provides people across the state the care they need.”</td>
<td>Use Coalition information &amp; materials to promote the initiative to our constituencies, networks &amp; volunteers. Lead: Tim. Ongoing</td>
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| Eliminate the Medicaid Expansion Sunset, increase funding for the Medicaid HCBS Waiver and for veteran services all through an increase in Montanan’s tobacco tax. | The Tobacco Industry will outspend our campaign by at least 3 to 1. 24,000 signatures are required to get the issue on the ballot; the Coalition is shooting for 30,000 signatures. The deadline is the last week in June. There are stringent reporting guidelines for the Commission of Political Practices. Every dollar and hour spent on the campaign need to be recorded and reported consistently every month. | **Major Allies**  
Governor’s Office  
MT Hospital Assoc.  
MT Medical Assoc.  
ACS-CAN  
SEIU  
MBPC  
BCBS  
MEAMFT  
Montana Primary Care Association  
American Heart Assoc.  
American Lung Assoc. | Montana initiative specifically in Billings, Bozeman, Great Falls, Helena, Kalispell & Missoula | “This is a tobacco tax initiative that would fund and preserve Montana’s Medicaid program and prevent 100,000 Montanans from losing their health insurance.” | Post and boost our support materials on Facebook & post on our site. By May 28. Lead: Stacia & Tim. Cost: $10K Ongoing. |
| **Intermediate Goal:**     |                                                   | **Opposition**                      | Registered Montana voters, specifically in | “Provides needed funds for veterans’ suicide prevention programs, long-term care services to help seniors stay in their homes, and programs to prevent kids from smoking and help smokers quit.” | Contribute to the Coalition for June media and promotion. By June 15. Lead: Tim. Cost: $10K Completed. |
| Pass the Tobacco Tax Initiative on the November 2018 Ballot. |                                                   | Big Tobacco Convenience Stores  
Americans for Prosperity-Koch $  
MT Taxpayers’ Association  
15 Republican state legislators who have publicly opposed I-185. | | “If you don’t use tobacco products—You can’t pay | Send out monthly CONVIO messages up to September and then bi-weekly in Sept & October. Lead: Steve & Stacia. To be in August. Ongoing. |
| **Short-term Goal:**       |                                                   |                                   | Registered Montana voters, specifically in | | Submit a Bulletin article for the October issue. By July 13th. Lead: Stacia. Completed. |
Who do you trust to protect our kids?
Big Tobacco corporations or our doctors, nurses and the following organizations:

AARP Montana
American Lung Association
American Heart Association
Cancer Action Network

Initiative 185 postcards

I-185 keeps kids from smoking.
Nearly 1 in 3 Montana teens vape or use e-cigarettes.
10,000 kids will die prematurely from smoking.

Vote YES I-185

Big tobacco companies know I-185 will keep kids from smoking.
That's why they are spending $17 million to defeat I-185.

Here's the truth:
I-185 is fully funded.
If you don't smoke you, don't pay.

STAND UP TO BIG TOBACCO COMPANIES

Vote YES I-185

Paid for by Healthy Montana
Dr. Steven Bailey, Treasurer
P.O. Box 1614
Helena, MT 59624
Help keep Montanans healthy!

The Healthy Montana Ballot Initiative (I-185) is an increase in the state tobacco tax on all tobacco products. Part of the revenue generated would help older Montanans stay in their own homes as they age and would prevent nearly 100,000 Montanans from losing their health coverage.

Vote YES for I-185 on the General Election Ballot this fall.
For more information visit www.HealthyMontana.org

I-185 will Help Older Montanans
We have an opportunity to help ensure Montanans can access care & stay healthy.

I-185 Will:

- Help keep rural hospitals open, ensuring access to care for families in small towns and rural communities.
- Help older Montanans stay in their own homes and communities as they age.
- Provide vital funding for veteran suicide prevention programs and prevent kids from smoking and help smokers quit.

Promote and Protect the Health of Montanans - VOTE YES on I-185.

“"The I-185 boost for home and community-based services would be beneficial to Montana’s seniors and veterans. Our members want to stay in their own homes.
Join me in voting ‘YES’ on I-185 on your General Election ballot this fall.”

-- AL WARD, AARP MONTANA STATE PRESIDENT, VETERAN
AL Ward, Montana State Volunteer President, talks about Initiative-185
Questions?

Tim Summers
Director, AARP Montana

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(406) 457-4701
The Nashville Campaign for Transportation

Nashville is growing by 100 people a day

Jobs and economic growth are Nashville’s engine. But, growth does NOT have to equal gridlock.

Nashville Population

<table>
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<tr>
<th>Year</th>
<th>Davidson County</th>
<th>10-County Cumberland Region</th>
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<tbody>
<tr>
<td>1970</td>
<td>805,241</td>
<td>448,734</td>
</tr>
<tr>
<td>1990</td>
<td>1,140,334</td>
<td>510,748</td>
</tr>
<tr>
<td>2015</td>
<td>1,980,192</td>
<td>657,627</td>
</tr>
<tr>
<td>2040</td>
<td>3,096,602</td>
<td>813,297</td>
</tr>
</tbody>
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Source: Nashville Area MPO

LET’S MOVE NASHVILLE
Metro’s Transportation Solution

Traffic is getting worse.
2010-2015: 111,405 more commuters

The need and demand for more transportation options is growing.

For more information visit LetsMoveNashville.com

Source: Nashville Area Chamber of Commerce

Millennials:
Transit is among their TOP 3 criteria for where to live

22% of population and growing

Source: Nashville Area Chamber of Commerce

Seniors:
85% lack access to quality public transportation

11% of population and growing

Source: Think Tennessee

Poor transit + long commute times = fewer opportunities

- Nashville ranks 92/100 in work force access to transit.
- Commute time is the strongest predictor for escaping poverty.

Source: Brookings Institution; Harvard University

Based on years of public input, planning and engineering studies, THIS is a program that works for Nashville.

It’s time to get started.
The Nashville Campaign for Transportation

Bus Improvements Now

Frequent Transit Network
on MTA’s 10 busiest routes

- INCREASED FREQUENCY
  MTA will improve frequency with service that comes at least every 15 minutes during peak commute times.

- EXPANDED SERVICE HOURS
  Monday–Saturday: 5:15 a.m.–1:15 a.m.
  Sunday: 6:15 a.m.–10:15 p.m.

Rapid Bus

- Approximately 25 miles of total rapid bus is proposed along Dickerson, Clarksville Pike (Bordeaux), West End and Hillsboro Road to improve travel times with level-boarding, off-board fare collection, intersection priority, and dedicated lanes where feasible.

Access Ride Improvements

- Real-time information, call-ahead service and same-day schedule availability.

New Crosstown Routes

- 4 crosstown routes: Trinity Lane, Airport-Opry Mills Connector, Edgehill Ave, and Bell Road/Old Hickory Blvd.
- 80 percent reduction in travel time on some trips.

Let’s Move Nashville is a $5.4 billion infrastructure investment in our city

Surcharges won’t break the bank.

- SALES TAX:
  ½ cent increase (2018-2023),
  1 cent increase (after 2023)

- HOTEL/MOTEL TAX:
  ¼ cent increase (2018-2023),
  ½ cent increase (after 2023)

- CAR RENTAL: 20 percent surcharge

- BUSINESS TAX: 20 percent surcharge

Individual Impact
2018-2023:

17¢ / $5 per month
for the average Nashville residents

After 2023:

35¢ / $10 per month

Better Access to Transit

- Neighborhood Transit Centers will provide safe and comfortable locations to board the bus, convenient pedestrian connections, and real-time arrival information for buses and trains.
- Improved intersections and more crosswalks, along with new and expanded sidewalks, will create safer, walkable corridors and better access to transit.
- Mobility-on-Demand zones will provide integrated ride-sharing trips to transit stops, helping with first/last-mile connections.

47% of sales tax is paid by non-Davidson County residents
The Nashville Campaign for Transportation

Dollars invested will create good-paying local jobs

3,850 Jobs Per Year

$3.66 billion Labor Income

CONVENIENCE

76% of residents | 89% of jobs will be within ½ mile walk of transit

RELIABILITY

In 2040, LRT trips will be 31 minutes faster than buses and 15 minutes faster than cars.

Murfreesboro Line to DTWLN—26 minutes
Gallatin Line to DTWLN—21 minutes
Nolensville Line to DTWLN—19 minutes
Charlotte Line to DTWLN—17 minutes
Northwest Line to DTWLN—16 minutes

72% of public school student riders will have faster commute times

60% of senior riders and 100% of Access Riders will benefit

AFFORDABILITY

Nashvillians now spend $12,000 on transportation costs per year

For middle-income Nashvillians this = 25% of their income on transportation alone

Source: Center for Neighborhood Technology

FREE AND REDUCED FARES

Children, older Nashvillians and people with disabilities will have reduced transit fares, and low-income individuals will have free fares.

Source: Let’s Move Nashville Transit Improvement Plan, December 2017

Nashville’s future is on the ballot

TRANSPORTATION WILL:

• Make our communities safer and more inclusive
• Reduce cost burdens and improve access to opportunities
• Make growth work for all Nashvillians

Registration deadline is April 2nd
Early voting starts April 11th
Election Day: May 1st
The Nashville Campaign for Transportation

The Opposition

- Organized
- $$$ - Funded by Americans For Prosperity and influential, Nashville car dealer
- Used simple messaging, which made it easy to vote no
- Used social media to target public

- Other wrinkle – mayor’s resignation and misuse of public funds
The Nashville Campaign for Transportation

The Outcome

- Ballot initiative was unsuccessful by vote of 64% to 36%.

Lessons Learned by AARP Tennessee

- Coalitions – work best if they are representative of all community interests.
- Messaging – developed by local PR firm that was associated with the mayor. Be careful not to attach messaging to any one person or official.
- Plan – Big and bold, but served the urban core – needed regional solution. Ultimately the outlying areas of Nashville voted against the ballot initiative.
- Messaging – be flexible and nimble, must be able to change messaging depending on the circumstances.
What AARP Research Revealed about the Nashville Ballot

- AARP undertook a survey to explore why Nashville voters supported or opposed the transportation ballot initiative.

- Key Findings Include:
  - A majority of those who voted against the ballot initiative did so because they thought the project was too expensive and there were not enough benefits compared to the cost.
  - A majority of opposition voters would have considered supporting the ballot initiative if it would have been a smaller project.
Deciding Factors Considered by Opposition Voters

- Project was too expensive: 89%
- Not enough benefits compared to the cost: 82%
- Other priorities that Nashville needs to pay for first: 68%
- Increase in sales tax: 66%
- Transit improvements weren’t going to benefit my community: 65%
- No personal benefit from the transit improvements: 65%
- The plan would not improve driving conditions: 65%
- Don’t trust that the money will be spent on the transit project: 40%
- Increase in business tax: 38%
Factors Opposition Say Would Have Change Their Vote

- You knew it would reduce traffic congestion: 63%
- It was a smaller project to improve just the bus system: 62%
- It would be better for the environment: 49%
- There was more transparency about how the funds...: 48%
- It would make it easier to get around without relying on...: 45%
- Fewer taxes would have been increased: 44%
- It was a smaller project to bring in a light rail system: 44%
- There was no increase in the sales tax: 42%
- It would help the city’s economic growth: 39%
- Q16_K. You wouldn’t need to rely on personal vehicles as...: 34%
- You had more confidence in the elected officials...: 33%
- It would help attract younger people to the city: 20%
Voter Willingness to Pay for New Transportation System With Increased Taxes and Fees

“How willing would you be to pay for improvements in Nashville’s transportation system through some types of taxes or fees?”

- Very/Somewhat willing: 63%
- Not very/Not at all willing: 35%
Members welcome our work on local advocacy, specifically related to livable communities and support for 50 and older, even if just in concept.

Awareness of our local work remains low but it is growing in targeted markets. Those that know our local work give very positive feedback.

Listen early: Solicit feedback from neighborhoods impacted by changes early in the process and convey clear reasoning behind advocacy decisions to help build awareness and trust locally.
Key Insights From Local Advocacy Campaigns

- To increase AARP’s credibility in local issues, communicate that the decision to take a position was made locally, by people in the community, and has been managed locally through the AARP state office.
- Communicating the link between AARP’s constituency – adults ages 50 and older - and livable community initiatives will help establish AARP’s motivation for being involved in these issues.
- Pursue a focused, targeted change.
- Develop strategy and operations as a political campaign rather than a public education initiative.
Key Insights From Local Advocacy Campaigns

- Make sure the initiative is a cost effective and efficient use of tax dollars. Convey this to voters.
- Be sure your coalition is representative of all community interests.
- Consider the impact of the initiative on all constituents in all parts of the region impacted (i.e., multicultural communities).
- Don’t underestimate the opposition.
- Avail yourself of all integrated campaign tactics. Direct mail and targeted social media are critical to raising awareness/engaging members in local issues.
Questions?

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