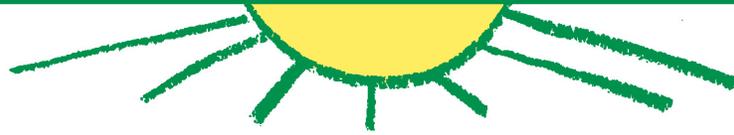


Center for Education Reform



910 Seventeenth Street, NW
Suite 1120 • Washington, DC 20006

4825 Bethesda Avenue
Suite 220 • Bethesda, MD 20814

February 20, 2009

Mr. George Fischer
Waterfront Park Place Condominiums
222 East Witherspoon Street
Louisville, KY 40202

Dear George:

Thank you for this opportunity to assist you with your interest to reform education in the Commonwealth of Kentucky. Your dedication to expanding each child's opportunity for a better future and your vision to do so with increased educational choices offers a model of enthusiasm and leadership that will make it easier for others to follow in your footsteps. We are pleased to have been asked to participate with you and your fellow Kentuckians for the work of a lifetime.

We envision the effort you are about to undertake to reform education in Kentucky to be conducted in three distinct phases. The first phase, which we are happy to submit with this transmittal, is the preliminary plan of action we have designed especially for your consideration. This preliminary business plan is based upon The Center for Education Reform's fifteen years experience in making change happen in states where no history of reform exists; our research conducted this year in the commonwealth concerning the people policies and political environment at work presently; and finally personal interviews and analysis of the major factors that can be brought to influence any policy or political effort. The strategies presented to you here are based upon best practices and will inform your decision to move forward.

Phase II will launch a formal educational reform effort, which includes putting more detail into every strategy, developing the Executive Committee to guide this endeavor and beginning the fundraising.

Phase III executes the campaign, based upon the adopted plan. The campaign team put into place will initiate the rollout of a new organization; oversee the hiring and training of talented staff; implement the strategy with targeted tactics and focus, combine communications and advocacy efforts necessary to first educate and then finally, motivate the electorate to adopt reform.

We at the Center for Education Reform are extremely excited about the opportunities present in Kentucky. We look forward to providing you information and discussing options and opportunities. Thank you again for including us!

Best Regards,


Jeanne Allen
President

1-800-521-2118

www.edreform.com

301-986-8088



EXECUTIVE SUMMARY

Political solutions involving school choice have not made it past a legislator's introduction to becoming accepted in Kentucky because they were not well sold to the public and there were no negative consequences to legislators for failing to accept such proposals.

We propose creation of a campaign rooted in a new network of individuals and a dynamic and growing list of organizations whose work will be unique from the beginning. Our campaign goals, not grounded in any one organization or effort, will represent the voice of the Commonwealth's people in all its incarnations rather than the voice of an ideology, specific area or interest group. The campaign will be opportunistic and populist, the two major tactics that the Obama campaign utilized to secured unprecedented support from all races and political party loyalists.

A new education leadership committee (proposed name -- Education Kentucky) will be asked to consider the execution of a campaign to lead two agendas:

- 1) A comprehensive education package that provides Kentucky with a blueprint for a strong charter school law, a set of choices for at-risk children and those who are stuck in failing schools, a requirement for accountability in all schools that allows policymakers to evaluate choices, and an alternative certification and pay plan for teachers that provides immediate funds to traditional school districts that choose to participate. (2-3 years)
- 2) A pilot project that allows children in a limited number of failing schools to be determined to carry with them state funds to a private, non-sectarian school, other public school or tutoring center. (1 year)

The conclusions of the Center for Education Reform's environmental assessment of the political, social and educational climate of Kentucky follow, along with a plan outlining the structure, goals and strategies to be executed in the building of a successful and comprehensive educational reform effort.



PHASE ONE:
*Preliminary Business Plan of Action
for Education Reform in Kentucky*

Myriad surveys over time in Kentucky – and indeed throughout the country – yield high support for education reform in general, and specifically, for choice-based programs that put parents in the driver’s seat. There is no dearth of support for such ideas, and yet, years of effort in Kentucky have yielded little progress in this arena. The research makes clear that the reason is not a lack of interest. The reason that political solutions involving school choice have not made it past a legislator’s introduction in most cases is because to be accepted, the idea must be well sold to the public and the consequence to legislators for failing to accept such proposals must be negative.

Most school choice efforts in the past have been publicly led by individuals and groups whose political clout and base is narrow and easy to contort. Because education has an almost untouchable aura surrounding it, anything perceived as oppositional to the concept in general will be suspect. Even though school choice in its most controversial forms enjoys support from among a “tri-partisan” electorate, and transcends race and religious distinctions, the current political appetite is narrow. If only a small, narrow group of policymakers works to advance an issue, then it is easy to dismiss it. If the only vocal supporters of an issue are traditionally associated with groups considered (however wrong) anti-public education, it will be difficult to change the perception that support is narrow. If you like an issue but do not respect the persons who most vocally advocate, then your support for that issue becomes secondary to your attitudes.

This is the conclusion of our work in the states, and it is the conclusion that has informed successful campaigns for reform. For example:

Florida: When Jeb Bush ran for Governor of Florida successfully on his second try in 2000, he advocated forcefully for an education agenda that appealed to most voters, and laid the groundwork for a successful legislative agenda over the next two years. He articulated that Florida had a resource problem (money) and that teachers needed our support. However, he advocated at the same time for renewed accountability that would allow more money to flow to pockets of excellence, and allow parents to make fundamental decisions for their children’s education.

Such themes resonated then, and they resonate now, particularly in states where bedrock cultural values remain. Parents in charge, hard work, respect for teachers.

In the ensuing two years following his election, Governor Bush traveled every county and city in the Florida, and each time, regardless of the issue, he talked about his education agenda. On the ground, he maintained a tight control on advocates. He worked to ensure that no one was off message, and while inviting their participation, he made it clear that he was driving the agenda.

He succeeded, and the success – vouchers, accountability, new charters – has had an impact to this day. While the publicly-funded voucher program was struck down by the courts, the special needs scholarship remains in place, actively supporting tens of thousands of children who need additional support.



Bush had the help of several urban, black leaders during his effort. One, the head of the Miami Urban League, is today the head of the Florida State Board of Education. T. Willard Fair's contribution was critical and he was a partner, not a member of the audience, during the Bush "education campaign."

Washington, DC: A similar scenario played out in Washington, DC, where then President George Bush forged a unique relationship in 2003 with then DC Mayor Anthony Williams. The support they garnered among the leader of the City Council education committee, business leaders, and a handful of prominent Congressional democrats led to the victory of the DC Scholarship program, as well as continued support for the city's charters. That coalition is also helping to keep alive the more recent efforts by the city's new schools chancellor to institute a performance pay effort for teachers, against union preferences.

Ohio is another state where a tightly controlled, well-messaged effort led to reform success. In this case, the recent effort was to defend the state's robust charter movement against a Governor, press and many legislators of both parties seeking to shut down most of the state's choice programs (which had similarly been won years before with a coalition and effort not unlike that of Florida). Then Speaker of the House Jon Husted saw a disparate group of organizations from inside and outside of the state conflicting and fighting to be in control of the effort to challenge the proposed cuts. Husted organized a meeting with all those parties with CER's assistance. He made it clear that we work together, and that he expected one air-traffic controller to lead the effort and others to follow. Husted requested both air and ground cover – and remained involved through a three-month effort. At the end, the Governor withdrew his budget proposal as the response of parents, citizens and in general the huge numbers of people who rallied convinced them that his movement was not one he could bully.

Ohio shows that in the absence of a Governor, a strong legislator can have the same impact, as long as he is joined by an equally impressive private sector counterpart. *(There are at least a dozen examples of efforts where advocates were not successful in their efforts. In those cases, the efforts were disorganized, had too many cooks, used ineffective tactics, and appeared to even legislative supporters as lacking influence.)*

Kentucky will need to draw from its current legislative menu to find a champion. It is likely this champion needs be a new face, which we would aim to explore in the kick off phase of the campaign. However, what Kentucky can learn from the above critical three experiences is that a campaign that seeks to bring about a broad school choice package can succeed, only if the following things are in place:

- Legislative champion
- Well-planned campaign that includes both air and ground cover
- Tightly controlled roles and responsibilities for all involved parties, managed by one central "air traffic controller," i.e. campaign headquarters/manager
- Clear, sound, messages delivered uniquely through both traditional and new media
- Trained spokespeople

Today, however, none of these components currently exist.



Environmental Review

State-Supported Education Leadership (i.e. The Establishment)

Education in Kentucky is centrally controlled by the State Education Department, whose power and influence grew following the adoption of Kentucky Education Reform Act (KERA) and subsequently the development of the Pritchard Committee. Both are widely viewed as at least moderately successful by members of both parties as well as by the general public. (The only negatives that appear generally shared are about the subsequent CATs testing program, but for varying reasons, all based on ideology, not results.) KERA was adopted at a time when most states had no state standards or consequential student assessments. Spending at the time ranked Kentucky in the bottom five of all states and teacher certification was considered lacking in rigor as well as ignored in the state's most disadvantaged districts.

While such inputs have little correlation to student achievement, and while KERA is not making an impact in improving education at the pace necessary, modest improvements over time have convinced those in power that KERA has had an impact and that the policies implemented over time because of KERA should not be dismissed. In August 2001, Kentucky students exceeded the national average on standardized tests in third, sixth and ninth grades. That's not a huge accomplishment, as CTBS is not standards based, but it did set the tone for further solidification of KERA.

State policymakers depend on the established education agencies and organizations for guidance. They cited the allegedly non-partisan Legislative Research Commission (LRC) as their main go to source of information, as that is the entity that staffs the legislators. But the LRC relies heavily on the status quo, not new ideas, to guide legislators. Policymakers often cited the Department of Education, the State Superintendents Groups, the KEA and KAPE (the alternative educators group) as valuable organizations. In short, they rely on the very people who show up, who consult one another, and again, who represent the status quo. Then there are those on the outside who are associated with supporting and implementing the KERA – these include: NCPIE.org, KY PIRC, the Kentucky Association for Gifted Education (KAGE), and of course, the PTA. While all have slightly differing views of KERA, they support the state's leadership in distributing funds and regulating their industry.

Closely tied to KERA's progress is the Pritchard Committee on Academic Excellence. Heavily parent-focused but education establishment led, the staff of the Pritchard Committee believes reform is possible if you work within the system. They have great faith in processes, rules and inputs and while their board is a place to potentially mine for support, the programs and staff that are well financed by state and national groups remains fixed on the status quo. Like most state efforts, "ordinary" parents know little about the role of the Pritchard Committee, the state education department, and others in this general category.

While the Pritchard Committee does not take a position on school choice, the absence of any literature or programs that include the various options is itself a statement of opposition. Legislators in many states believe that when an issue is not raised by the "experts" in public education, it must not be right. This conclusion was borne out by our limited personal interviews. Leaders in both parties believe that charter schools, for example, are a non-issue. Republican leader David Williams



attributed the lack of progress on charters to a “strong teachers union.” To us that means he is unwilling or unable to control his chamber’s agenda, and therefore unlikely to be of great help on any effort we forge. The degree to which leaders rely on the KEA for support will be a necessary step in the research conducted in the early stages of the campaign.

The influence of the KEA is interesting. While Kentucky requires the union to be voted in by a district to secure collective bargaining controls, the KEA still retains an enormous lock on policy decisions, from the education superintendent to the legislators to the press. The only fundamental difference between KEA and KAPE, is that KAPE is opposed to collective bargaining and represents teachers as a professional association, not a labor union. While KAPE members privately like choice options more than KEA, they would not take a position publicly on the issue. More than anything, KAPE leadership admits there is very little information available from sources other than conservative groups (i.e. Bluegrass Institute) and so they would not want to compromise their position with legislators by signing onto something perceived as far right.

One person we have spoken with noted that the Education Department reportedly works against school choice efforts and we have noticed that through our review as well. They utter comments discounting the applicability of charter schools in Kentucky. “We don’t need *that*,” is the way it’s said. It’s easier to discard than criticize – and more effective, too. That is a lesson for our own messaging.

KERA’s current review by policymakers will likely result in amended standards, changes in funding and potentially less, not more, rigor that would not be the right prescription for student achievement. The debate on the future of the CATs test specifically (and KERA in general) is controlled by state education staff — who have demonstrated opposition to federal benchmarks and want to make testing less objective and more focused on individual learning. It is likely a new test the state chooses to use will be based on off-the-shelf standardized tests, making data less useful. This may provide us an ideal situation for new reforms to be proposed. Strategy-wise, it’s best to launch new initiatives when the old ones appear to be on the chopping block and there is no clear consensus on what to do.

That said, KERA is not a good target of any campaign we launch. We can argue the reality and facts but money and time are still considered by most lay people to be the two conditions necessary to educate children. Therefore opposing a “reform” program that many believe has helped children and teachers is a lose-lose effort.

Reformers, Advocates

We attempted to gauge the acceptability of the groups working in the reform arena. There are two kinds of reform advocates we explored in conversations. There are the existing groups whose work includes a focus on education, and there are parents who have from time to time expressed interest – or maybe anger – over their schools.

Clearly, there are only two visible camps among advocates in Kentucky. There are those who are viewed as pro-voucher, as conservative, and therefore, anti-KERA. These include the Bluegrass Institute, the dozen or so home-school based networks, and the Family Foundation of Kentucky.



Those who speak out against KERA are symbolic to policymakers. They may provide balance for reporters and bloggers, but because they have failed to make best practice recommendations to improve the state's "normal" public school programs, they are considered less than credible.

We considered the literature, websites, views and in-person interviews in making our conclusions. While more detail is available, for now, we will simply summarize to say that the impressions of existing supporters of any potential choice effort are negative. Websites are poorly constructed and combine support for school choice related issues with links to many conservative and even controversial statements. The Family Forum's blog, which is actually well organized, has education choice next to statements about transgender teachers, issues relating to treatment for aids, and extramarital affairs. The Bluegrass Institute is more straightforward policy wise but doesn't provide any sense that they represent more than a couple of internal voices.

The only seemingly independent voices about that do not have strong negatives associated with them is the School Choice Scholarships program, and *Kentucky School News and Commentary*, a blog edited daily by former educator Richard Day.

A google search of School Choice Scholarships, however, reveals their mention/citations by only conservative choice groups. With the exception of CER where the program is listed on a directory, the data on this program is cited in work by Heritage, Friedman, Heartland, Family Foundation, etc. That means that if School Choice Scholarships were the focus of media inquiry during a campaign, the natural conclusion and one pushed by the education establishment, would be that the initiative for more school choice in Kentucky is embraced only by right wing groups.

On the religious side, Kentucky Catholic Conference will not be visibly helpful as they have steered clear of policies that may impede their ability to occasionally get support for their non-education issues. The Christian Home Educators of Kentucky are strong in their belief in parents' rights but tend to be skeptical of charter and voucher programs, as they believe it means more, not less government control. These are typical approaches by similar organizations in other states.

Despite what appears visible work on the part of all the aforementioned groups, only ten percent of those interviewed mentioned any of them. Only Ruth Green, head of KAPE, mentioned the Bluegrass Institute and it was mentioned as pushing vouchers, along with the Heritage Foundation. Ruth did not think vouchers were worth pushing but she and parents we interviewed were very interested personally in charter schools. None of the legislators we spoke to cited any group other than state-supported entities as resources on education. We believe this is because each of the groups that do embrace reform are not seen first as education organizations, but instead are seen as having an agenda on some other level. True or not, it's a perception that will govern our proposal going forward.

While it may seem odd that we'd make conclusions based on limited interviews, it's important to note that the results we received are consistent with what we've learned by watching the state, our own analysis of the literature, the conclusions drawn from reviewing dozens of media clips as well as affirmed by our work in other states. This is textbook education advocacy and the main reason we do not have progress in states like Kentucky. There has been no concerted effort to review the track record of all existing



advocacy assets in a critical way with an eye toward a specific goal, specific audiences and long-term sustainable success. In short, we have not treated education reform like a business endeavor. Doing so is the path to success. We must first work to understand the main audience – legislators, and why they say and do what they do.

Legislative Agendas

Our interview with Rep. Charles Miller (D-Louisville), Vice Chair of the Education Committee was telling. Miller didn't mention any education organizations he thought were great resources, except the principals' association to which he once belonged. He confirmed that a lot of legislators were former school teachers or administrators and that money was really the biggest issue. He's convinced Kentucky already offers choice among public schools (open enrollment), but because many people don't use it, there is not much interest in choice. "I'm a public school person," he said, meaning he has little use for it. On the question of what education reforms he knows of that might be worthwhile to look at, he said he doesn't know of any but probably should because he's on the board of the Southern Legislative Council. "Oh, there's those schools Obama talked about – charter schools – but I'm not sure they are really public." Later he said, "We're not conditioned to charters. We have good public schools."

Rep. Miller is not atypical of what we hear from members of both parties, though former educators are the most pernicious when it comes to having a limited point of view for legislation. Embracing something new is like suggesting your life in education was not worth it.

Most people who are in the policymaking business – from state government officials to legislators – are constrained by their own idea of what school choice is – and how it can/cannot help Kentucky. While it's clear the opponents want no part of it, they do not necessarily represent the majority. Indeed, surveys from other states tell us that the vast majority of people do not know enough to love or hate education reform. Barely 20% can define what a charter school is, and the remaining do not even want to venture a guess. That provides both challenges and opportunities.

People like Rep. Miller are a paradigm for what we have to do to win. He and others we interviewed believe only the groups to which they belong(ed) are resources or experts. They like them because they know them. Thus they will not be swayed by arguments, or by money. They will only be won — or at least neutralized — if people they know and like are supportive.

Meanwhile, our support base in legislative arenas or among statewide groups is limited in its influence and knowledge of what is possible. All supporters tend to think they know a lot about education reform. They believe the very limited charter proposals recently introduced really reflect what charters are and can do. They've never heard an argument about university authorizers, nor have they seen a charter school that is legally independent from a school district, bypasses all state agency rules and works directly for the people. They cannot fathom the notion, which means their imagination is not big enough yet — this year at least — to undertake the kind of massive effort we believe we need to launch.

The other factor that has limited potential for reform in Kentucky is the sponsorship of each bill, and the timing of each. The first tax credit proposal was



introduced in 2005 and a few days later it was sent to committee to die. The next effort was by Rep. Stan Lee, who authored a special needs scholarship program bill patterned after those in place by this time in Florida and Ohio. It did not get through committee. It had only a few sponsors. There appear to be a few scattered efforts after that, but the only other formal bills introduced were last year. The first, by Stan Lee, again, was a minimalist proposal for charter schools that was sent to committee within two days of introduction and forgotten. Rep. Mike Harmon introduced a corporate tax credit bill, which isn't being pursued again this year.

In each case, these champions of choice were working with a small group of supporters to advance their cause, some inside the state, some outside the state (i.e. Friedman Foundation). There was little preparation, little long-term planning, and no thoughtful campaign mounted before introduction of each bill. Thus each time the efforts were dead on arrival. Well-intentioned, but DOA.

Rep. Stan Lee is a stalwart supporter, and a very well-known conservative and evangelical. In 20 years, nationwide, any effort led by someone with that profile – whether Bible belt or not – has failed to muster enough credibility and votes to make it. He and Rep. Mike Harmon may well be negatives in the battle to expand the message – and the messengers – to a more mainstream, diverse public.

This will not sit well with the Family Foundation or other groups who rely on Rep. Lee. His good works notwithstanding, many Republicans have had to come to terms over time with the fact that they are liabilities, not assets, when it comes to education. Only a good program enacted that works for all kids will release that negativity. But our analysis suggests that these individuals and others like them are tolerated, and not applauded, even by their own party.

Blue-dog democrats with a penchant for school reform do not seem to exist, but part of the campaign effort will be to identify all potential supporters and opponents and put the through a careful assessment to highlight the possible credible champions any effort will need.

Finally, our environmental assessment suggests that many members of the media are potential allies, but little has been done to provide ongoing, detailed, factually based information from a variety of diverse sources to them in aid of the cause. In addition, reporters are driven by news, and without anyone in Kentucky making news about education reform, they are unlikely to do anything but briefly cover issues of interest to us from time to time.



State Assessment Conclusions

We conclude the following about the condition of education reform and it's support base in the state:

- 1) Small, non-influential support base, which actually has more negatives than positives.
- 2) Uninformed / misinformed legislative leaders, which also must rely heavily on lobbyists and state bureaucrats for information, as they have no real personal staff. This means they are more likely to buy into conventional arguments. It also means that, regardless of party, reputations of various groups matter.
- 3) There is no one natural spokesperson in the state but we must find people to be groomed.
- 4) Fairly unbiased media, which simply puts state education views first, as that's all they know.
- 5) Minority community that could be strong supporters, but has not been fully engaged.
- 6) Traditional use of media will not work alone to solidify a base of support.

Campaign Plan

It is with this as a backdrop that we recommend the following business strategy outline:

Create a campaign vested in a new network of individuals and a dynamic and growing list of organizations, whose message from the beginning will be unique to its goals, not grounded in any one existing organization or effort, and will represent the voice of the people in all its incarnations, rather than the voice of an ideology, specific area or interest group.

What follows is a preliminary business plan for a campaign that will ensure the children of Kentucky are given access to a wide variety of quality choices, and that all families have accountability driven schools, dictated by clear standards.



Off to the Races — Model Structure — Who, What, Where

Goal

To successfully forge a rainbow of ideology, race and class, which is critical to advancing reform, to secure a clear, focused legislative package for education reform within three years.

That is not to say this is the primary goal, but it is the umbrella under which all efforts must fall, and will guide the thinking about the proposals to write, the coalitions to build and the strategies to employ. This is particularly important in a state where diversity has challenged its leaders especially on the heels of a very tenuous election where someone like Mitch McConnell nearly lost his seat.

A new education leadership committee (proposed name -- Education Kentucky) will be asked to consider the execution of a campaign to lead two agendas:

- 1) A comprehensive education package that provides Kentucky with a blueprint for a strong charter school law, a set of choices for at-risk children and those who are stuck in failing schools, a requirement for accountability in all schools that allows policymakers to evaluate choices, and an alternative certification and pay plan for teachers that provides immediate funds to traditional school districts that choose to participate.
(2-3 years)

- 1) A pilot project that allows children in a limited number of failing schools to be determined to carry with them state funds to a private, non-sectarian school, other public school or tutoring center.
(1 year)

The leadership team will be briefed thoroughly on the policy proposals, their legal, social and political impact and the data and results we know to be right on each. We will talk through the issues and challenges regarding the Blaine Amendment, and how to construct a plan that confronts this age-old discriminatory clause. The second of the two agendas is designed to give supporters an immediate boost, to test out a few key people and strategies, but to lay the groundwork for a successful coalition that can take the state and its reform supporters to the next level.



Campaign Strategies

We propose a large ground effort that brings together a very diverse set of groups and interests working toward our goals. The ground effort will be complemented by a minimum paid air game, and a maximum of earned media. It will be scheduled to build on current events, as opposed to creating new ones and coordinate with critical political efforts to make ours the most salient issue of the day in Kentucky.

Most important, it will be opportunistic and populist, the two major assets the Obama campaign had that secured unprecedented support from all races and political party loyalists.

We have analyzed the methods by which the active electorate gets its information. We have compared this to what we know about parents and voters in general. Technology is our friend in this campaign, and to the extent the campaign can launch on Facebook as well as be networked through Twitter, Stumble-it and other popular sites, we will beat the old-fashioned establishment who remain fixed on paper and in the halls of the Capitol. As important, we will develop new friends in the media, new faces among the business and civic communities and consequently, new legislative champions. We will cause the citizens of Kentucky to learn about education reform, and demand it of their lawmakers. That is the key to success. To do that, we will undertake five broad strategies, which will each need their own business plan and timeline to execute.

Strategy 1 – People to People Communications -- “Bowling Alone No More”

Kentucky is rich with civic and social groups that are the underpinning of resident’s lives. While Robert Putman warned Americans that we have reached the point where social and civic networks are no longer forging new memberships and people are glued to technology outlets that give them their social fabric at home, Kentuckians are different and they want to stay glued to the in-person connections that make their home special.

Thus the campaign will develop key “proof” points in the community that allow for extensive debate, discussion and social acceptance of our goals. We will seek existing networks and build events around them and other areas where “ordinary” people visit and socialize. These include:

- State and County Fairs
- Lions, Kiwanis, Rotary
- Specialized events, such as runs, walks, Special Olympics
- Major community and school dinners and events, plays, sporting events

New coalitions of people will be built from among new people at each meeting we attend, but we will also seek to uncover all of the hundreds of “kitchen table” groups that exist throughout the state, heavily dominated by parents, that have come together over important community issues, from installation of speed bumps in a neighborhood to noise levels on the new senior high football field.



Strategy 2 – Traditional Media Communications

There are 28 daily newspapers in the state, 184 Weeklies, 24 local television stations. Some are small, some are statewide. The media operation of the campaign will involve mapping out the reach of each outlet, and identifying opportunities to engage reporters, editors and advertising staff as needed. While the focus will be on earned media, we will recommend potential advertising in conjunction with the campaign effort. This will help us hit the state's 120 counties with the right degree of saturation. It will also help us to grow supporters in parts of the state that are plagued by bad education (such as parts of Louisville, Lexington, Covington, Appalachia).

We will also vet our messages through our media contacts. For example, we will test out themes relating to state achievement. "Did you know that over half our state's schools have failed to meet state minimum standards?" Indeed, most Kentuckians would be chastened to learn that only a third of all schools have reached their targets!

Strategy 3 – New Media Communications

Blog, Twitter, Facebook...the world today revolves around an amalgam of websites that connect you immediately with friends who might live down the street – or down the planet. Young people are being pushed out by an increasing number of adults – parents, interested activists—who seek to find new friends across their community and share their world in ways they'd never done so before.

President Obama is the first US president to use the social networking world to secure supporters, mobilize a nation and secure his historic victory.

It's sophisticated but easy — there must be messages crafted and messengers tasked. There must be ongoing monitoring of all the work that is relayed about our effort through these networks. Then it grows organically and pushes policymakers to respond.

Strategy 4 – Legislator Education and Advocacy

Getting to know every legislator – and what makes them tick – is part and parcel of any successful effort. While ultimately the campaign must choose its partners and work to support their leadership in securing our legislative goals, we must first understand who they are and work to build bridges where possible with non-traditional supporters. To do this, the campaign must initiate a major research effort that pulls together information for each legislator, such as background, affiliations, voting records, professional and personal interests. With this information, a strategy will be created for each legislator that identifies how best to approach them, events at which they may be influenced, relationships that may help us in our efforts, and potential political support that may move them in the right direction — or at least neutralize them.



Strategy 5 – Developing New Leaders and New Faces

The state is rich with groups representing civic interests, business and even a major non-profit education group — The Pritchard Committee — which have followed traditional education programs, rather than delving deeper into more substantive, and potentially controversial reforms. Like policymakers, these influencers often defer to their staffs or traditional groups to guide them. The board members of these groups each have their own sphere of influence. For example, Madisonville Mayor William Cox, Jr. is a young and upcoming public servant who may likely be open to our effort. He is an attorney by trade, and interested in making his community better. He does not appear partisan; and may very well be open to embracing changes.

Kelli Gilbert at Fidelity Investments in Covington is another potential partner. She is a member of the Pritchard Committee, too, but was most recently appointed by the Governor to his new Commission on Philanthropy. Indeed many of the Governor's appointees represent spheres of influence that are almost non-existent in public policy circles. Most of us have stayed away from this playing field, seeking to find people already aligned with us. However, the opportunity for change today – and the embrace of charter schools by the Obama administration – gives us a new door to open.

The campaign's research works to create a database of all of the most influential board members on these and other groups and seeks to find areas of potential camaraderie. The strategies to reach those people selected will be determined by the information gathered, but we will seek to identify at least a few new faces to be new leaders in our effort.

Conclusion

The goals and strategies, and the implementation steps detailed in the campaign organizational structure, timeline and budget presented here are ideally suited for the adoption of education reform in the Commonwealth of Kentucky. These plans are ambitious, and the work ahead immense, but experience and vision will combine at this point in time to expand the opportunities to raise public awareness, to advocate school choice and to adopt charter schools. The budget that follows is “blue sky,” having been created with assumptions on buying talent, media and engaging in activities at maximum ability. It can be modified, as can be the campaign structure, and it's expected that each line in this plan and corresponding documents will require a thorough review at Phase II.



The Plan

Across these strategies we will develop several parallel activities to publicize our effort with key messages, ensure active grassroots-policymaker-media communication, and in general create a real buzz that draws attention as we move on through our timeline.

These activities will take place in roughly the following proposed timeframe, which also include suggested hiring and fundraising goals. Further detail will be created in subsequent plans.

Hiring for campaign leadership begins	May 1 - August 1
Polling and focus groups (the polling co. inc.)	May 1 - June 1
Message Development	June 1 - July 31
New Media message testing	Sept 1 - Oct 1
New Media portals established	Oct 1
Research	May 1 - Ongoing
Grassroots strategy development	Sept 1 - Oct 1
Policymaker education	Oct 1 - Jan 1
Education campaign – air	Oct 1 - Jan 1
Media outreach	Oct 1 - Ongoing
Ground campaign	Oct 1 - Nov 15 Jan 2 - April 1
Champion identification	Ongoing
Pilot Program launch	Dec 1
Legislative session 2010	Jan 5 - April 1 (est.)
Year two development, timeline, strategy	April 1 - May 1

Campaign Proposed Timeline

Project Task	May	June	July	August	September	October	November	December	January '10	February '10	March '10	April '10	May '10
Hiring for campaign leadership begins	█	█	█										
Polling and focus groups (the polling co.)	█												
Message Development		█	█										
New Media message testing					█								
New Media portals established						█							
Research	█	█	█	█	█	█	█	█	█	█	█	█	█
Grassroots strategy development					█								
Policymaker education						█	█	█					
Education campaign - Air						█	█	█					
Media outreach						█	█	█	█	█	█	█	█
Ground campaign						█	█		█	█	█		
Champion identification	█	█	█	█	█	█	█	█	█	█	█	█	█
Pilot Program launch								█					
Legislative session 2010									█	█	█		
Year two development, timeline, strategy												█	



Structure — Campaign Organization

The yet 'un-named' education leadership committee will serve as the client or surrogate "candidate" and nexus of all initiatives and efforts to reform education in the Commonwealth of Kentucky.

General Consultant – Responsible for overall strategic development, policy and issue development, goals and tactics of the campaign; this entity directs the organization, and its implementation and evaluation of all components including the individuals and messages necessary to create a winning advocacy effort. The General Consultant will be responsible for recruiting, retaining and managing all vendors and subsequent political consultants necessary for the campaigns operations. The General Consultant has expertise in issue specific campaigns, in the acquisition and management of professional services, in the supervision and direction of key personnel involved in the comprehensive effort of the campaign. All themes, messages, advocacy, coalitions and campaign timing will remain the responsibility of this consultant while the day-to-day direction and implementation of these decisions will be the responsibility of the Campaign Manager.

Campaign Chairman - This is the role of the Chairman of the Board, a well-known and respected person from the Commonwealth who gives credibility to the campaign and acts as chief fundraiser. This is a vital role to solicit peers in the business and financial community willing to donate necessary funding to support the efforts of the entire team. An accomplished salesman, the Campaign Chairman will serve these dual roles.

Executive Committee comprised of the General Consultant, Campaign Chair and Manager and once identified, the Spokesman.

Executive Committee Director – Responsible for providing leadership necessary to merge many different people and personalities into one smooth, efficient operation. Controls budget and managing funds, keeps Executive Committee informed of all activities and programs, must be the 'enforcer' able to say no to staff and the donors.

Finance Committee comprised of the Campaign Chairman, Treasurer, Legal Counsel, Key Donors and Fundraising Consultant. The Treasurer will see that monies received and dispersed are accurately recorded and filed with various agencies as required by state law. The Legal Counsel, a practicing attorney, will advise the campaign on matters such as getting on the ballot, state and local restrictions on campaign advertising, spending limitations, financial reporting laws and methods of combating voter fraud. Key donors involved in the voluntary finance organization will be responsible for successfully raising all the funds necessary including personal solicitations, events, PAC solicitations, direct mail and small donor programs. The fundraising consultant, if necessary, provides professional organization and administrative support for all donor activities.

Paid Staff – These positions are full-time and are directed by the General Consultant in conjunction with the overall strategic plan, tactics and goals agreed upon by the Executive Committee. Compensation for FT salaried independent contractors is normally in the range of \$4-12,000 per month for the campaign manager and \$3-4,000 per month for each director.



Campaign Manager – Responsible for managing and controlling complete day-to-day activities, coordinates budget and funding needs, keeps general consultant informed of all activities and programs, must be the ‘enforcer’ able to say no to staff and volunteers. The manager keeps a low profile when it comes to publicity, making sure the spokesman is quoted and must know the problems and capabilities of the people in the campaign. Suggested salary \$6,000 minimum monthly.

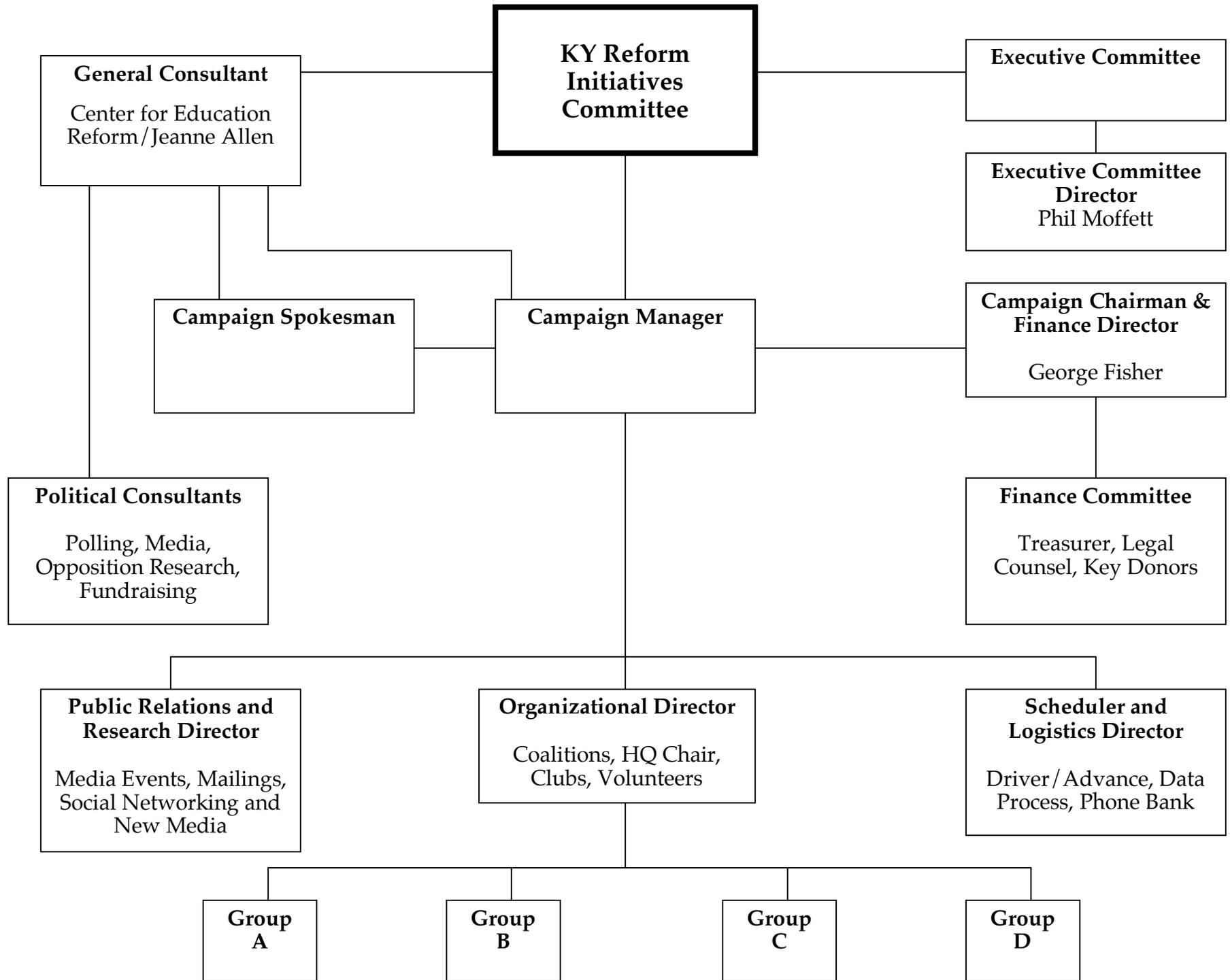
Public Relations and Research Director – This individual is in charge of the campaign’s communications effort. The primary responsibility of the public relations director is to make the campaign initiatives well known to the electorate. This includes dealing with the media, social networking media, preparing speeches and statements, orchestrating events and appearances. At the beginning of the campaign, the director will gather all information and research needed to write messages and support the professional advisors and throughout the campaign, will continue to gather research such as demographics, voting information, issue and opposition research as assigned. The director needs to understand the overall campaign strategy and theme, will need to think creatively and about politically effective ways to get our theme across to local voters. This person may be asked to speak on behalf of the campaign as backup only for the campaign spokesman. This individual reports to the campaign manager. Suggested salary \$4,000 monthly.

Organizational Director – This individual is responsible for recruiting, motivating, directing and managing volunteers for the implementation of the campaign organizational projects. The overall campaign plan will determine what type of coalitions are needed, including volunteer support, phone, direct mail and new media (social networking) solicitations, precinct organizing and other assigned tasks to complete projects. This individual reports to the campaign manager. Suggested salary \$3,000 monthly.

Scheduler and Logistics Director – This individual is responsible for having good political judgment, for both ‘re-active’ scheduling of campaign activities and ‘pro-active’ solicitations of productive ways to promote the initiatives and issues of the campaign. The scheduling and logistics function requires a well-organized, detail-oriented person able to deal effectively with people and the public. This person will decline and accept opportunities to showcase the campaign, to schedule key campaign personnel at functions and events and to provide advance materials, escorts and staffing, drivers, surrogates and other support. This individual reports to the campaign manager. Suggested salary \$3,000 monthly.

Campaign Consultants – Vendors hired to provide services for the campaign may offer advice on overall campaign strategy and planning, campaign management, radio, TV and direct mail advertising, social networking, graphics, polling, fundraising, issue development and opposition research, voter turnout, media buying or any combination of these services. For this initiative, it is likely that a pollster, opposition researcher, and media consultant will be necessary at a minimum.

Organizational Chart





Blue-Sky Kentucky Education Reform Campaign Budget

	Year One	Year Two	Year Three
Paid Staff			
Campaign Manager	\$72,000	\$72,000	\$72,000
PR/Research Director	\$48,000	\$48,000	\$48,000
Organizational Director	\$36,000	\$36,000	\$36,000
Scheduler/Logistics	\$36,000	\$36,000	\$36,000
Consultants			
General Consultant	\$200,000	\$200,000	\$50,000
Executive Committee Director	\$144,000	\$144,000	\$144,000
Treasurer	pro bono	pro bono	pro bono
Legal Counsel	pro bono	pro bono	pro bono
Opposition & Issue Research	\$50,000	\$25,000	\$10,000
Polling			
Benchmark	\$40,000	-	-
Focus Groups	\$60,000	\$30,000	-
Media			
<i>Paid*</i>	\$50,000	\$250,000	\$350,000
Earned	-	-	-
<i>Fundraising Consultant*</i>	\$120,000	\$120,000	-
Finance Committee			
Events	\$10,000	\$20,000	\$20,000
Direct Mail	-	\$25,000	\$55,000
Personal Solicitations	\$20,000	\$10,000	-
Small Donors	\$5,000	\$10,000	-
Operating Costs			
Headquarters	\$36,000	\$36,000	\$36,000
Telephone & Utilities	\$24,000	\$24,000	\$24,000
Travel & Meals	\$45,000	\$45,000	\$45,000
Supplies	\$10,000	\$8,000	\$6,000
Other	\$5,000	\$5,000	\$5,000
Political Operations			
Promotional Events	\$15,000	\$25,000	\$40,000
Voter Events	-	-	\$40,000
Media Events	\$15,000	\$20,000	\$40,000
Message			
Collaterals/Printing	\$50,000	\$100,000	\$50,000
Mailings/Electioneering	-	\$25,000	\$75,000
Direct Mail/Advocacy	-	\$50,000	\$100,000
Newspapers/Radio	-	-	\$75,000
	\$1,091,000	\$1,364,000	\$1,357,000

Italics - potential cutback if necessary*