



**ADDENDUM #1**

This addendum to the Master Services Agreement dated 5/4/23, is made by and between the **School District No. 414 (Kimberly)**, referred to as the "Client" located at **141 Center Street West; Kimberly, ID 83341**, AND **Clearwater Financial, LLC** located at **PO Box 505 Eagle, ID 83616**, referred to as the "Consultant."

1. **Scope of Services.** The Client hereby employs the Consultant to perform the following services in accordance with the terms and conditions set forth in this addendum and any attached exhibits. These services include:

- a. Public Engagement & Levy Election Outreach: See **Exhibit A** to this addendum.

The completion of this scope will be dependent on the availability of information needed to complete the scope as identified in **Exhibit A**, some of which may be provided by the Client.

2. **Terms of Agreement.** This addendum will begin when this addendum is fully executed by both the Client and the Consultant. The time frames for delivery of services will be measured from the execution of this addendum and as outlined in **Exhibit A**.

3. **Cost of Services.** The Client will pay the costs for these services will be:

- a. Exhibit A: \$25,000

The Consultant will submit a monthly invoice for services performed. The Client will pay the Consultant the amount due as indicated within thirty (30) days of the invoice date.

If additional expenses such as travel, meals, communications, print, software, data sources, and other out-of-pocket expenses are required; these costs will be paid by the Client to the Consultant.

4. All other terms and conditions as outlined in the Master Services Agreement remain in force.

Client: School District No. 414 (Kimberly)  
Name: Luke Schroeder  
Title: Superintendent

Consultant: Clearwater Financial  
Name: Cameron Arial  
Title: President

/s/: \_\_\_\_\_  
Date: \_\_\_\_\_

/s/: \_\_\_\_\_  
Date: 8/25/23

Attest: \_\_\_\_\_



## OVERVIEW

## EXHIBIT A

### 1. Project Background and Description

- i** • **Purpose:** Inform, engage, and involve the community in a meaningful way to help ensure understanding and support for District's continuation of its 2-year \$800,000 supplemental levy.
- **Background: Kimberly School District**
  - Kimberly School District No.414 is in [Kimberly, Idaho.](#)
  - City of Kimberly [Census Data](#): There are approximately 3,600 people and 1,300 households in Kimberly, Idaho.
  - The school district employes 300 community members, serves 1,929 students and has a projected growth of 5-6% in the next ten years.
  - The District operates one pre-kindergarten, two elementary, one middle, one high school and a charter school.
  - The district is seeking renewal of its current levy amount of \$800K that will expire June 2024.
  - The supplemental levy resolution was approved by KSD Trustees for the November 7, 2023, ballot on 08,17,2023
  - A supplemental levy has been supported by the community for over a decade and is imperative to District operations funding nine teaching positions and many other support-service positions.
  - Levy funds will be used to fund salary and benefits for positions that are not funded by the legislature.
  - District leadership:
    - has expressed concern at the low passage rate for the past several levies.
    - feels the environment has changed and past public outreach methodology needs to be improved.
    - has expressed the District needs additional expertise and/or staffing to improve engagement with the community.
- **Involved parties:**
  - Superintendent, Luke Schroeder
  - Bond Counsel, TBD Hawley Troxell representative
  - General Counsel, TBD representative
  - Other stakeholders as needed, TBD

### 2. Project Scope

- i** The scope of this work includes the following services identified as needed by the District.

#### **Campaign Process:**

The campaign process is designed to be comprehensive, and systematic allowing the District to use data, facts, and timelines to tell the story of **what** the District's needs are, **why** it's important to address them now, **how much** the levy will cost and **when** and **how** the funds will be used.

1. **Discover** (identify team, review existing docs, needs, cost logistics and plans)  
In this step we identify the campaign team including key employees, external parties such as bond counsel, and other contracted partners that we will be working with. We then review the entity's history, financial



needs, resources, prior public outreach tactics and level of success related to these tactics and gaps specific to the project and public finance ask.

2. **Schedule** (project timelines, milestone, events)

We create campaign timelines that incorporate the identification and scheduling of key community and public events, deliverable milestones and checkpoints that help evaluate community support at each milestone.

3. **Demographics** (get to know the voter)

To better understand the individuals that will be voting on the project, we research and analyze various levels of demographic and voter data sources to determine voter engagement. This provides invaluable insight as to initial and needed benchmarks allowing the outreach materials to be designed around these metrics. CWF also uses geospatial visualization tools to help the District know where voters are and how best to communicate and engage with them. These tools and strategies will be particularly helpful given the compressed timeline.

4. **Survey** (educate/gather feedback) *Note: A survey has been developed and deployed. Continued monitoring and follow-up on results will continue.*

The purpose of the survey is to educate and inform the public on project, establish a baseline on feedback, and to check assumptions of support. This includes identifying who to and how to send the survey, creating and disseminating the survey, analyzing results, and summarizing learnings to develop the campaign.

5. **Interview** (educate/gather feedback from stakeholders including the formation of a Citizen Committee)

This step includes creating thoughtful and project specific questions that will be used to inform and engage stakeholders and educate the client including, identifying who to interview, creating the questions, scheduling interviews, analyzing results, and summarizing learnings to develop the campaign.

6. **Build** (campaign plan)

Once the prework is completed and the collected information has been received, reviewed, and analyzed, the campaign’s outreach strategies will be reset. This includes refining the schedule, determining the messaging, creating the most effective multichannel collateral pieces, and identifying the deployment methods that are best suited for the specific campaign.

Using the information gathered through surveys, voter demographics, and interviews; specifically created and tailored messages are created. Campaign branding will be clear, concise, and consistent and the messaging strategy is centered around educating the public on what the project is, why it’s needed, what the scope and costs are and when it is needed. Engaging unheard voices in the community is crucial, including those reluctant to share input is a key element. While not all may agree, our process ensures their concerns are considered, helping them understand the District’s needs better.

A central call-to-action and related milestone call-to-action statements will accompany all outreach. The outreach will culminate in a get-out-the-vote effort including messaging and outreach specifically designed to drive education and participation in the election.

7. **Deploy** (multichannel campaign deliverables)

Once the messaging is dialed in, we focus on deployment. Multichannel information pieces are developed for multiple touchpoints and sources of information that the public can refer to early and often. Information is disseminated via chosen channels deemed to have the largest and most impactful reach for the campaign.

Examples can include:

Hard Copy, Online or Media Outreach	In Person Outreach
Dedicated webpage(s): project and funding overviews, FAQs	Presentations to professional, civic, homeowner, and other community groups
Email, newsletters, social media,	Presentations/updates at public meetings
Direct mail, inserts	Community and/or focus group meetings
Videos	Parent Nights
Surveys	Tabling at local special events
Media: press releases to local media, Opinion Pieces from respected person in the community	Work to secure interviews for leaders of the municipality



8. **Analyze results:** (receive, review, and adjust)

Clearwater Financial staff continually provides summaries and implements learnings to refine messaging for each deliverable based on how it is performing during the public engagement process. Analysis centers on determining support through the gathered feedback, reviewing what this means for the campaign and adjusting the strategy accordingly.

9. **Report:** (compile vote data during and after the election to include in final analysis)

CWF will use its extensive voter data tools to aid the District in updating voter engagement based on the team's engagement efforts throughout the campaign. This will help the team understand where adjustments in message and/or direction are needed to best engage the District's citizenry.

A post-election analysis will also be conducted to give the District insight into the effectiveness of the campaign and how to continue to engage with the community. This will be done by:

- utilizing data collection and analysis techniques to compile accurate and comprehensive voter data during the election period.
- Collaborating with Client staff to prepare a final election analysis report that highlights key findings, outcomes, and lessons learned from the election.

### 3. High-Level Requirements



**District staff will provide Clearwater Financial Staff with:**

- roles, responsibilities and contact information for staff, consultants and vendors involved in the project.
- information and calculations related to the supplemental levy including the tax assessment information, cost to taxpayers, possible concerns and uses.
- a list of internal stakeholders to interview: the District may want to consider members from the following groups: department heads, Board of Trustees, advisory board, PTO, long range planning groups, etc.
- a list of up to (10) external stakeholders to interview: could include prominent citizens, major employers, other municipal leaders, concerned citizen groups.
- a list of up to (7) members for a Citizen's Committee
- bond counsel and or general counsel review of all public engagement deliverables
- final approvals on public engagement deliverables

**District staff will engage with Clearwater staff throughout the process by:**

- supplying the names and contact information of key individuals that will serve as project owners at District
- approving scope and work deliverables
- attending meetings as scheduled
- scheduling meetings with key individuals and or at key locations when applicable
- staffing outreach events
- reviewing and approving information as needed to complete the project
- posting and /or disseminating information provided by Clearwater Financial in a timely manner
- approving interactions with other contracted consultants such as bond counsel or general counsel.



## 4. Deliverables

**i** Note: Final deliverables will be determined after the initial meeting to specifically discuss project communications needs. Examples of deliverables

- Project overview, timeline including sequencing of activities and events and responsible party
- Monthly updates for Trustees and staff
- Development of outreach content, strategies, and dissemination channels:
  - Messaging, talking points and collateral development that meets legal requirements.
  - Website content such as campaign landing page, FAQs, interactive content
  - Social channel posts
  - Event pictures and videos
  - Newsletters (internal/ external)
  - Press release(s)
  - Mailers, flyers, signs
  - Development of scripts for calling, interviews and partners
  - Community presentations
- Internal stakeholder interviews and summary of findings
- External stakeholder interviews and summary of findings
- Formation of Citizens Committee and summary of findings
- Voter Demographic Information, analysis, and final report

## 5. Specific Exclusions from Scope

**i** Does not include:

- guaranteed results of a campaign or election
- posting content on the District's web pages or social media sites. CWF will provide the information to the District for posting and dissemination.
- printing costs, event registrations, costs associated with purchasing radio, TV, newspaper or social media ads, billboards, articles, direct mail, etc. The District should plan a separate budget for these expenses. CWF staff can provide budget guidelines.

## 6. Implementation Plan

**i**

CWF staff will work with District staff to develop a comprehensive and integrated timeline for the overall campaign and deliverables.

## 7. High-Level Timeline/Schedule

**NOTE:** Final schedule will depend on when agreements are completed and availability of District staff.

- Proposed Project start: August 23, 2023, or when the scope is approved, and the contract amendment completed.
- Project completion: November 7, 2023



**8. Cost To Complete Scope As Defined In Section 2**

**Note:** Travel to be billed separately based on travel costs incurred. Clearwater Financial staff to work with District staff to determine appropriate travel to ensure the scope parameters are met.

**\$25,000**

**APPROVAL**

I approve the project as described above, and authorize the team to proceed.

Name	Title	Date