

GODBE RESEARCH
Gain Insight

REVISED PROPOSAL TO CONDUCT A PARCEL TAX FEASIBILITY SURVEY

Presented to the San Leandro Unified School District

July 3, 2012

PROPOSED PROJECT WORK PLAN

Godbe Research believes strongly that a project's success depends on recognizing the individual and unique research needs of each of our clients, and then customizing a research plan to meet these needs. Accordingly, we have put together the following recommended approach to addressing the parcel tax feasibility survey needs of the San Leandro Unified School District (District) to indicate the types of considerations that are involved in each of our research projects.

Project Research Objectives

Before beginning any research project, Godbe Research spends considerable time reviewing each client's research objectives to choose the most appropriate research design. Although the kick-off meeting for the project will be devoted to "fleshing out" the research objectives in great detail, it is our current understanding that the District is interested in exploring the feasibility of parcel tax measure in the November 2012 Presidential general election cycle. With a parcel tax year running from July to June (bills go out in August and are due in December and April), any election cycle from the August 2012 special election (all mail ballot) to the June 2013 special election cycle (polling place) would net the District proceeds in the same general time frame.

Thus, while we will look primarily at November 2012 as the District's preferred election cycle, we certainly recommend flagging voters in other election cycles up to June 2013 to maximize the value of the polling for the District. Accordingly, the parcel tax measure feasibility survey for the District should be designed to:

- ✓ evaluate the funding priorities of voters in the San Leandro Unified School District vis-à-vis public K -12 education;
- ✓ determine baseline and informed support for potential parcel tax measure among voters in the District;
- ✓ confirm that November 2012 is the most viable election cycle for the measure, or recommend an alternative election cycle that would net the District parcel tax proceeds in the same time frame;
- ✓ determine and rank the specific projects and programs that would be funded by the parcel tax measure, including ones that could be reduced or eliminated without adequate funding, according to voter preference/support;
- ✓ examine the impact of various statements on voters' support for the parcel tax measure (arguments "for" and "against" the measure);
- ✓ specifically evaluate the potential impact of the two Statewide tax measures on the ballot in November 2012 on the parcel tax, especially among casual (once every four year) voters;
- ✓ identify an affordable tax threshold supported by the necessary percentage of District voters for the parcel tax;
- ✓ identify how best to package the measure so that the required percentage of District can be expected to support the parcel tax when placed on the ballot, *and*;

- ✓ collect demographic information on District voters not already contained in the voter file for profiling and segmentation purposes for later education and outreach to voters and the community in general.

Proposed Scope of Work

Godbe Research has a proven process for conducting parcel tax research/feasibility studies, which has lead to a success rate of greater than 90%, hundreds of successful parcel tax measures, and more than a billion dollars in local funding for public education tax and bond for measures for which we have been the pollster. Based on our experience, specific tasks for the parcel tax measure feasibility study of San Leandro Unified School District voters are envisioned to include:

- Kicking off the project with the District and developing a project work plan and time line. We would also want to include any external/internal stakeholders appropriate to the process (e.g. financial consultant, District council, Lew Edwards Group, etc.), based on District purview.

- Reviewing background materials, voter and resident demographic data, previous polling studies (i.e. recent District polling, any county polling, city polling, etc.), and other information that will aid in the development of the sampling strategy and survey instrument for this specific study.

- Developing a stratified and clustered sample of District voters likely to vote in the November 2012 Presidential general election cycle, as well as potentially flagging voters likely to vote in other election opportunities up to June 2013. Election cycles in these ranges would provide parcel tax proceeds for the 2013 – 2014 property tax year. For reference, the following election opportunities are available during that time frame: a November 2012 general election (polling place); a March 2013 special election (mail ballot), a May 2013 special election (mail ballot), and; June 2013 special election (polling place).

    - ❖ Based on a review of District voter demographics, we have identified that there are a total of 32,281 voters in the San Leandro Unified School District, of which there are approximately 25,877 likely voters in the November 2012 Presidential general election cycle. In addition, there are between approximately 8,304 and 12,340 voters in the polling place and all mail ballot special election opportunities in the spring and early summer of 2013.

- Developing and refining a survey instrument that will achieve the research objectives for the parcel tax feasibility survey, through an iterative process with the District and relevant project stakeholders. At this point, we envision a survey of approximately 17 to 18-minutes in length, based on previous recent tax surveys and District needs.

    - ❖ Each of our revenue measure surreys is customized to a given client's needs; however, the survey design follows a specific and proven format. Accordingly, the survey will address topics such as: issues of importance to the community vis-à-vis public education; support for Statewide tax measures in November, a first unaided ballot test; tax threshold test using a reverse auction method; a ranking of projects/programs to be funded or maintained by parcel tax

proceeds; arguments 'for' and 'against' the measure; duration of the tax and any special features (e.g. COLA, senior exemption, etc.); a second ballot test after relevant information has been presented, and finally; voter demographics not included in the voter file.

- Pre-testing the survey instrument to ensure that voters can understand the question and response codes and that the survey is of the proper length.

- CATI programming the survey instrument for accurate and efficient data collection and training telephone interviewing personnel on administering the survey during an intensive training session.

- Optionally translating the survey into Spanish and Cantonese and conducting Spanish and Cantonese language interviews for up to 5% of interviews in each language.

    - We have provided optional costs for this service later in the proposal. The recommendation to translate the survey into Spanish is based on the approximate 17% and 5% of District voters identified as being of Latino ethnicity and preferring to receive election materials in Spanish, respectively, based on the State voter file. The recommendation to translate the survey into Cantonese is based on the approximate 6% and 5% of District voters identified as being of Chinese ethnicity and preferring to receive election materials in Chinese, respectively, also based on the State voter file.

- Conducting telephone interviews with 400 (n=400) total voters in the San Leandro Unified School District, likely to vote in the election cycles of interest. For reference the, a sample size of 400 interviews will provide for a margin of error range of no greater than +/-4.87%, at the 95% confidence level.

- Processing the data from the survey according to a strict quality control protocol and weighting the data, as necessary, to ensure that the results reflect opinions that are truly representative of District voters in each of the election cycles of interest.

- Meeting with the District shortly after the survey has finished fielding to review the topline/aggregate survey results, which will help to guide our analysis and reporting to be of maximum value to the District in moving forward with a parcel tax measure.

- Analyzing the data from the survey and producing a summary of conclusions and recommendations for the parcel tax measure in the form of crosstabulations and toplines

- Post-survey consulting on the results and recommendations from the survey with the District and any other stakeholders throughout the revenue measure process up to Election Day (value added/no charge).

PROJECT TIME LINE

Godbe Research generally prefers to conduct parcel tax measure feasibility survey process over about a six week process, depending on various project factors; however, we've completed voter opinion research projects in a little as 10 days. Below is a time line in number of days to illustrate the amount of time and specific steps that go into the polling process.

A formal time line with actual dates will be provided to the District shortly after the project kick-off meeting, as the first deliverables in the research process. To show the level of effort needed from the District in terms of meeting and review time, District tasks and meetings have been *italicized* for easy review.

Project Task	**Approx. Time**
Kick-Off Meeting with the District	*1 Day (1 to 2 hours)* *Week of July 2nd*
Develop Sampling Design	3 to 5 Days
Questionnaire Drafting and Refinement (concurrent with sampling design)	3 to 5 Days
Questionnaire Review Meeting w District	*1 Day (1 to 2 hours)* *By July 10th or 11th*
Survey Pretest and Questionnaire Finalization	1 Day
CATI Programming	1 Day
Survey Translation (concurrent with CATI programming)	1 to 2 Days
Interviewing/Data Collection	3 to 5 Days
Initial Data Processing	2 to 3 Days
Topline Report Meeting with the District	*1 Day (1 to 2 hours)* *By July 16th – 18th*
Analysis and Crosstabluation Development	3 to 5 Days
Post-Survey Consulting with the District and Other Project Stakeholders	Ongoing / No Charge Through Election Day
Last Day to Put a Measure on the November 2012 Ballot	August 10, 2012

GODBE RESEARCH PROJECT MANAGER

The team at Godbe Research is comprised of recognized experts in survey research design and implementation, and for this project for the San Leandro Unified School District we will assign our President and Principal Researcher (Bryan Godbe) as project manager and day-to-day contact. Bryan will be assisted by additional Godbe Research team members, as needed, and a brief resume for Bryan has been provided below.

Bryan Godbe, M.A.
President and Principal Researcher
As the President and founder of Godbe Research, Mr. Godbe has more than 20 years of experience in public opinion research, public relations, government affairs, and campaign management. In this capacity he has conducted hundreds of public opinion and market research projects at the national, state, and local levels for councils of government, libraries, water districts, and hundreds of cities, counties, school districts, and special jurisdictions. He is a recognized leader and innovator in using voter opinion research to assess the feasibility of revenue measures and to design public information campaigns to generate support for measures that would otherwise fail.

Mr. Godbe has been involved in several recent ground-breaking polling studies for California school and community college district revenue measures. This includes being the pollster for the first successful parcel tax in the State of California for a community college district with the success of the San Mateo County Community College District's June 2010 measure. In addition, Bryan has also been the project manager for recently successful bond and parcel taxes for the Hayward, Newark Unified School District, West Contra Costa Unified School District, Fremont Unified School District, San Mateo Union High School District, Piedmont Unified School District, South San Francisco Unified School District, City of San Leandro, City of Hayward, City of Union City, and others.

Prior to founding the firm, Mr. Godbe was Vice President of Research at a California-based public relations firm. He also serves as the Senior Research Consultant at the Center for the Study of Los Angeles at Loyola-Marymount University. He has a Masters from the University of Michigan where he studied survey research methodology at the Institute for Social Research, and a B.A. from the University of California, Berkeley.

GODBE RESEARCH POLLING EXPERIENCE

Background and Experience

Godbe Research, a State of California certified small business enterprise (SBE), was founded in January of 1990. The firm is a full-service public opinion research agency that offers its clients extensive experience in public opinion research for bond and tax measure feasibility studies, community needs assessments, public education and outreach strategies, strategic and general planning efforts, public sector marketing efforts, and other customized client needs. Our fully-staffed offices in San Mateo (Corporate/Northern California), Newport Beach (Southern California/Southwest), and Bellevue (Seattle/Northwest) house a staff of highly trained and experienced researchers (all Master's or Ph.D. level), and a commitment to providing superior quality research and client services.

The firm has been employed by public and private sector clients throughout the United States and internationally, and the combined expertise of the Godbe Research team spans over 50 years in the field of public opinion research. The Godbe Research Team consists of the President and Principal Researcher (Bryan Godbe), Vice President of Research, Director of Business Development and Project Strategy, and a staff of Senior Research Managers, Senior Statistical Analysts, Research Analysts, and Research Associates. Each team member has the education and experience commensurate with their position at Godbe Research, and the team regularly teaches, authors, consults, and speaks in the field of survey research. In short, you will not find a more experienced and educated team in public opinion research.

Over the past 20 years, Godbe Research has become a recognized leader in public opinion research by utilizing telephone interviews, mail surveys, Internet surveys, one-on-one interviews, and focus groups to successfully assist school districts throughout California. Our experience includes conducting tax, bond, and assessment research for hundreds of California school districts, cities, counties, special districts, transportation planning agencies, and other public sector agencies. Accordingly, we have extensive experience in simple and weighted majority, Proposition 39 (55%), and super-majority (66.7%) voting environments. In addition, we are one of the few pollsters in the State with experience in conducting parcel tax measure feasibility studies for all mail-ballot election cycles that have lead to success on Election Day. Finally, we are also one of the few pollsters that have been involved with in-perpetuity parcel taxes, having been the pollster for Petaluma City Schools' successful parcel tax that has no sunset date.

With more than 20 years of parcel tax and bond polling experience for California school districts, including recent experience with the Fremont Unified School District (District), Godbe Research is the perfect firm to accomplish polling goals of this specific voter polling study. Since 2008 alone, our specific experience includes polling on successful bond and parcel tax measures (as well as CFD's) for clients such as the Hayward Unified School District (2012 parcel tax), Scotts Valley Unified School District (2012 parcel tax), Jefferson Union High School District (2012 parcel tax), Newark Unified School District (2011 bond), Cotati Rohnert Park Unified School District (2012 parcel tax), Dublin Unified School District (2012 bond and 2008 parcel tax), Redwood City School District (2012 parcel tax), Ross Valley School District (2012 parcel tax), Dixie Elementary School District (2011 parcel tax), San Carlos School District (2011 and 2009 parcel taxes), Fremont Unified School District (2010 parcel tax), West Contra Costa Unified School District (2010 bond and 2008 parcel tax), San Mateo Union High School District (2010 bond), South San Francisco Unified School District (2010 bond), San Mateo County Community College District (2010 parcel tax – first

ever for a community college district in CA), Alum Rock School District (2010 parcel tax), Santa Barbara Elementary and High School Districts (2010 bonds and 2008 parcel taxes), San Jose-Evergreen Community College District (2010 bond), Belmont Redwood Shores School District (2010 bond, 2010 CFD, 2008 parcel tax), Piedmont Unified School District (2009 parcel taxes), Livermore Valley Joint Unified School District (2008 parcel tax), Merced Union High School District (2008 bond), Escondido Union High School District (2008), and more than a dozen others. Specific to Alameda County and the City of San Leandro, Godbe Research's experience is unmatched. Aside from the projects listed above for the Hayward, Fremont, Livermore Valley, Piedmont, Newark, and Dublin Unified School Districts, Godbe Research was also the pollster for successful taxes between 2008 and 2010 for the Cities of San Leandro, Hayward, Newark, Albany, and Union City. Finally, Godbe Research is also currently working with the West Contra Costa Unified School District, Jefferson Elementary School District, San Mateo Foster City School District, Visalia Unified School District, Modesto City Schools, San Rafael City Schools, San Mateo County Community College District, and others on parcel tax measure polling for November 2012 or later.

Using survey research, Godbe Research is able to: evaluate baseline and informed support for a parcel tax; determine or confirm the election cycle in which the measure would have its best chance of success; determine the projects and programs voters want funded most by the parcel tax vis-à-vis District needs; determine the arguments and features that resonate with voters (both positive and negative); evaluate pitfalls to success (e.g. competing measures on the same ballot): help to inform the vital public information campaign and the substantive content of the campaign, as well as; determine an affordable tax threshold at which the required percentage of voters would support the measure. Collectively, this information allows Godbe Research to determine the best way to package a revenue measure for success including ballot language, campaign content, and election timing. Using our proven method, we have been successful in more than 90% of all parcel taxes we have been involved with for California school districts; moreover, this rate is good for the 20 year life of the firm.

As an organization, Godbe Research is a small business (less than 15 employees) and we manage our commitments wisely. This means managing our project load so that the President or Director of Research can be directly involved in each project we conduct. Similarly, we do not take on so many projects that we need to move team members or remove team members from current projects. Thus, Godbe Research is committed to allocating the team members outlined in this proposal for the duration of the project for the San Leandro Unified School District.

CLIENT REFERENCES

Below Godbe Research has provided several recent clients/projects for the San Leandro Unified School District to contact regarding our team, approach, and fees. If the District would like Godbe Research to facilitate contacting any of our references, please let us know. We understand that your staff and administration are extremely busy (like our references), and we are happy to assist the process any way we can.

Hayward Unified School District

Contact:	Stanley Dobbs, Assistant Superintendent of Business Services
Projects:	Bond/Parcel Tax Measure Feasibility Study 2011
Phone:	510-784-2634
Notes:	Godbe Research was the pollster for the District's successful June 2012 parcel tax measure.

Dublin Unified School District

Contact:	Dr. Stephen Hanke, Superintendent
	Bond Measure Tracking Survey 2012
Projects:	Bond Measure Feasibility Survey 2011
	Parcel Tax Feasibility Survey 2008
	District Planning Study of Residents 2006
Phone:	925-828-2551 ext. 8001
Notes:	Godbe Research was the pollster for the District's first parcel tax, passed in the November 2008 general election cycle. We were also the pollster for the District's recently successful bond measure in the June 2012 election cycle.

Fremont Unified School District

Contact:	Larry Sweeny, Trustee
Projects:	Bond Measure Tracking Survey 2012
	Bond Measure Feasibility Survey 2012
	Parcel Tax Measure Feasibility Survey 2011/2012
	Bond Measure Feasibility Survey 2001
Phone:	510-657-2350
Notes:	Godbe Research was the pollster for the District's successful November 2010 parcel tax measure, only one of two to pass in that election cycle. We are also currently working with the District on a bond measure process for November 2012.

Newark Unified School District

Contact:	Dave Marken, Superintendent
Projects:	Bond Tracking Survey of Voters 2011
	Revenue Measure Feasibility Study 2011
Phone:	510-818-4112
Notes:	Godbe Research was the pollster for the District's successful November 2011 bond measure.

City of Hayward

Contact:	Fran David, City Manager
Projects:	2012 Resident Satisfaction Survey
	2010 Bond Measure Feasibility Survey
	2010 Resident Satisfaction Survey
	2009 Revenue Measure Feasibility Survey
	2008 Voter Priorities/Satisfaction Satisfaction Survey
	2007 Revenue Measure Feasibility Survey (split sample)

	2000 Revenue Measure Feasibility Survey
Phone:	510-583-4302
Notes:	Godbe Research was the pollster for the City's successful May 2009 utility users tax. We are currently working with the City on a resident satisfaction survey and a bond measure survey for 2012 or later.

City of San Leandro

Contact:	Stephen Hollister, City Manager
Projects:	2010 Tracking Survey of Voters 2009 Revenue Measure Feasibility Survey 2007 Revenue Measure Feasibility Survey
Phone:	510-577-3390
Notes:	Godbe Research was the pollster for the City's successful November 2010 sales tax measure. We were also the pollster for the City's successful November 2008 utility users tax measures.

City of Union City

Contact:	Tony Acosta, Deputy City Manager
Project:	Sales Tax Measure Tracking Survey 2010 Tax Measure Feasibility Survey 2009
Phone:	510-675-5394
Notes:	Godbe Research was the pollster for the City's successful November 2010 sales tax measure.

PROPOSED PROJECT COSTS

Godbe Research takes great pride in delivering usable research projects on time and on budget. In doing so, we prefer to price our proposals using a firm and fixed-fee format rather than hourly rates. We feel that this pricing model provides the most flexibility to our clients and allows our clients to see the maximum a survey would cost based on the two most important factors: sample size and survey length.

Based on our understanding of the needs of the San Leandro Unified School District, we have provided costs associated with conducting a 17 to 18-minute survey of 400 (n=400) total District voters likely to vote in the election cycles of interest. In addtion, we have also provided optional costs to translate the survey and provide Spanish and Cantonese language interviewing for up to 5% of interviews in each language, based on language preference data in the State voter file.

The prices below reflect a firm, fixed-fee to complete the entire project--the overall cost will not exceed those shown below, provided that parameters (e.g. survey length, sample size, translation services, etc.) of the project conform to those outlined in this proposal. Should project parameters or needs change, we will be happy to provide the District with amended costs prior to proceeding.

Parcel Tax Survey of 400 (n=400) San Leandro USD Voters

Project Task	17-min.	18-min.
Listed Voter Sample	$900.00	$900.00
CATI Programming	$1,190.00	$1,260.00
Survey Pretest	No Charge	No Charge
Telephone Interviewing	$9,000.00	$9,360.00
Data Processing	$800.00	$800.00
Research Fee	$6,500.00	$6,500.00
Project Management	$1,500.00	$1,500.00
Miscellaneous Expenses	No Charge	No Charge
English Only Total	$19,890.00	$20,320.00
Spanish Language Translation	$600.00	$700.00
Spanish Interviewing Surcharge	$350.00	$400.00
Cost to Include Spanish Interviewing	$950.00	$1,100.00
Cantonese Language Translation	$950.00	$1,050.00
Cantonese Interviewing Surcharge	$1,000.00	$1,200.00
Cost to Include Cantonese Interviewing	$1,950.00	$2,250.00
All Inclusive Project Fees	$22,790.00	$23,670.00



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