Parcel Tax Feasibility Survey

Proposal for Research & Consulting

prepared for the

San Leandro Unified School District







January 11, 2017

TrueNorth Research | 1061 Neptune Avenue Encinitas CA 92024 760.632.9900 www.tn-research.com

Scope of Work

True North Research, Inc. (True North) is pleased to be the San Leandro Unified School District's (District) research partner for the forthcoming parcel tax feasibility survey. Our conversations to date have been quite helpful to our understanding of the District's objectives and needs with respect to the proposed research, and we have crafted this summary description of the proposed work scope and associated costs accordingly. However, if we missed an important detail—or if other issues have arisen that should be factored into the study—please feel free to contact us (760.632.9900) and we'll be happy to revise this estimate.

SCOPE OF WORK Creating revenue measures that are ultimately approved by the necessary percentage of voters is difficult, especially in the State of California. Successful measures require insightful research. The overriding objective of the survey is thus to produce an *unbiased, statistically reliable* evaluation of voters' interest in supporting a local parcel tax measure, as well as identify how best to align the measure with community priorities and package it for success.

The scope of services that we propose to perform for the District includes all tasks associated with designing, conducting and analyzing the survey, as well as presenting the results. Briefly, the scope of services includes:

- Meet with the District to thoroughly discuss the research objectives and methodology for the study, as well as discuss potential challenges, concerns, and issues that may surround the study.
- Develop a stratified and clustered sample of voters who—based on their voting history and registration status—are likely to participate in the elections of interest (June 2017 and August mailed-ballot special election) on the natural or through targeted outreach efforts.
- Develop a draft questionnaire for the District's review and make revisions as needed until all parties approve of the instrument.
- Pre-test the survey instrument to ensure its integrity.
- CATI (Computer Assisted Telephone Interviewing) program the finalized survey instrument to ensure accurate and reliable data collection using live telephone interviewers.
- Web program the same survey instrument to allow for email-based recruiting and secure, password-protected online data collection to compliment the telephone recruitment and data collection.
- Collect 400 quality interviews according to the sampling plan and a strict interviewing protocol. Interviewers will be professional, high quality interviewers. It is expected that the average interview will last approximately 16 minutes.
- Process the data, which includes conducting validity checks, cleaning, recoding, coding open-end responses, and adjusting for strategic oversampling (if used) through a statistical procedure known as 'weighting'.
- Prepare an initial topline report which presents the overall findings of the survey.
- Prepare a thorough report on the findings, including a detailed question-by-question analysis, description of the methodology, an executive summary of the key findings and conclusions/recommendations, as well as a comprehensive set of crosstabulations showing how the answers varied by subgroups of voters. The report will include extensive full-color graphics displaying the findings, as well as insightful narrative discussion of the results and their implications.

- Prepare an electronic copy of the final report to allow the District to reproduce the report as needed.
- Prepare a PowerPoint presentation of the results and present the results to the District.
- Be available to assist and provide advice to the District after the survey is complete.

COSTS True North's fixed-fee cost estimate to design and conduct the survey as described in this proposal is $26,850. This cost is inclusive—there will be no additional charges associated with the study.

ABOUT TRUE NORTH For the past 15 years, True North has specialized in providing school districts and other public agencies with statistically accurate research and insightful strategic advice. To date, our team has designed and conducted over 1,000 survey research studies for public agencies in California, including more than 300 revenue measure feasibility studies that captured the pieces of information needed for estimating the feasibility of a measure and—if feasible—identifying how best to package the measure for success. We have the highest *verifiable* success rate in the industry for school bonds and school parcel taxes, including 100% success for 2016 (46 measures, 46 wins). In total, the research that True North has conducted has led to over $27 billion in successful local revenue measures, including San Leandro USD's 2016 Measure J1 bond.

PROJECT MANAGER BIO Timothy McLarney, Ph.D., will serve as the Project Manager for this study. As President of True North, he is responsible for the design, management and analysis of True North's qualitative and quantitative research projects, including those that address community needs assessments, revenue measures, public policy, and strategic planning issues.

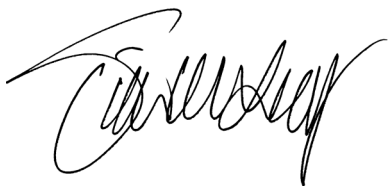
Dr. McLarney is a published author and a recognized expert in survey research methodology, sampling theory, weighting, and the use of statistical methods to generalize survey results. His research has been recognized at numerous national and state conferences, has been published in academic journals, and has earned him honors including the title of Visiting Scholar at the Institute of Governmental Studies at UC Berkeley. He has also served as an independent expert witness in survey research methodology for California legal cases. To date, Dr. McLarney has designed and conducted over 1,000 research studies, including more than 300 revenue measure feasibility surveys that have led to more than $27 billion in voter-approved bonds and tax measures.

Prior to co-founding True North Research, Dr. McLarney was the Director of Research at another west-coast survey firm and a consultant for Quest. Dr. McLarney holds a Ph.D. and M.A. in Government from Cornell University with an emphasis in survey research methods, voting behavior and sampling, as well as a Bachelor's degree in Politics from the University of California, Santa Cruz.

Letter of Agreement

This proposal and the standard business terms (see below) will serve as a letter of agreement between True North Research and the San Leandro Unified School District for the services described previously. In fulfillment of this agreement, True North will perform the services described in the *Scope of Work* on page 1. True North will invoice the full amount of the contract upon delivery of the report, with full payment due within 30 days of receiving the invoice.

Sincerely,



Timothy McLarney, Ph.D.
President
True North Research
1061 Neptune Avenue
Encinitas CA 92024

Agreed to and accepted by:

Dr. Kevin Collins
Assistant Superintendent of Business & Operations
San Leandro Unified School District
835 East 14th Street
San Leandro, CA 94577

BUSINESS TERMS Contracts and agreements between True North Research and its clients include the following general terms and conditions unless otherwise specified in a contract or agreement.

Flat Fees — Unless otherwise specified, True North Research charges a flat fee for all or a portion of its services to a client in lieu of hourly charges.

Notices — Any and all notices, demands, or other communications required or desired to be given hereunder by any party shall be documented in writing.

Confidentiality — True North Research acknowledges that during the engagement it will have access to and possibly become acquainted with trade secrets, inventions, innovations, processes, information, records, and specifications owned or licensed by the Client in connection with the operation of its business including, business and product processes, methods, customer lists, accounts, and procedures. True North Research agrees that it will not disclose any of the aforesaid, directly or indirectly, or use any of them in any manner, either during the term of this Agreement or at any time thereafter, except as required in the course of this engagement with the client, or without written consent from the client.

Acting as Agent — In compliance with California sales tax regulation, True North Research is designated as an Agent for the acquisition of tangible personal property and services as they apply to its clients' marketing activities.

Merger	The merger or consolidation of the client into or with any other entity shall not terminate or otherwise modify this Agreement.
Ownership of Materials	In producing finished products, it is expressly understood that ownership of all materials purchased by True North Research to complete the materials to be produced passes to its clients at the time of purchase and prior to any use by True North Research.
Independent Contractor	This Agreement shall not render True North Research an employee, partner, agent of, or joint venturer for the client for federal, state or local tax purposes, or for any other purpose.
Amendment Provision	This contract contains the entire agreement between the parties, and is subject to and will be construed under the laws of the State of California, and may be amended only in writing signed by both parties.
Successors	Any agreement between the agency and a client shall be binding upon, the heirs, successors and assignors of the parties.
Termination	The contract may be terminated by mutual consent of both parties, or by 10 days notice by either party. If the agreement is terminated, True North Research will bill the client for all work completed to date (including subcontractors' work).
Attorneys' Fees	Should any action be brought by one party against the other party to enforce any agreement, the prevailing party shall be entitled to recover from the other party its reasonable attorneys' fees, costs and expenses.
Governing Law	Any agreement between True North and a client shall be governed by California law and any action arising out of it shall be instituted and prosecuted in the Municipal or Superior Court of the County of San Diego.