



FAIRBANK, MASLIN,  
MAULLIN, METZ  
& ASSOCIATES

**TO** Redlands Unified School District  
Steven Gald, California Financial Services

**FROM** John Fairbank, Rick Sklarz, and Maya Gutierrez, FM3 Research

**RE:** Proposal to Conduct Polling for Redlands Unified School District

**DATE** September 29, 2023

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Fairbank, Maslin, Maullin, Metz & Associates (FM3) is pleased to submit this short scope of work to conduct public opinion research on a potential 2024 bond measure for the Redlands Unified School District. We believe our firm is an excellent choice to complete this work for several reasons, including:

- **As the District will recall, our firm worked for Redlands Unified School District on two surveys in recent years**—a community issues and budget priority survey in 2019 and a prior survey on a potential 2022 bond measure, which the District did not take to ballot. Through our past work for the District, we have gained a wealth of information on a variety of issues, which gives FM3 the unique advantage of being able to track the questions we've previously asked to see how public opinion has changed over time.
- **FM3 is a leading provider of accurate public opinion research for local California K-12 school districts considering revenue-enhancing ballot measures**—the firm's research has helped secure voter approval for more than \$59 billion in general obligation bond funding for California's K-12 school districts. More than 95% of the local school finance measures worked on by FM3 have gone on to win in the election. Additionally, election results are typically within the margins of error predicted by our survey research.
- **Currently, the FM3 researchers on this project are working with C.A.S.H. and C.B.I.A. to conduct polling on a \$14 billion statewide K-12/community college measure for the November 2024 election.** This work builds on the extensive statewide education bond work we have done in the past, as well as provides us with a deep understanding of the work to be done not only statewide, but also in local communities hoping to gain additional funding through the passage of a bond measure.
- **Additionally, we have worked extensively throughout San Bernardino County, including for numerous school districts** such as the Barstow Unified School District, the Chaffey Community College District, the Chino Valley Unified School District, the Etiwanda Unified School District, the Fontana Unified School District, the Ontario-Montclair School District, and the San Bernardino City Unified School District.

We appreciate the opportunity to be considered for this project. If you have any questions about the contents of this proposal, please do not hesitate to reach out—contact information is available on page 7.

A handwritten signature in blue ink, appearing to read "John Fairbank".

John Fairbank, Partner

A handwritten signature in blue ink, appearing to read "Rick Sklarz".

Rick Sklarz, Senior Vice President

A handwritten signature in blue ink, appearing to read "Maya Gutierrez".

Maya Gutierrez, Researcher

## RELEVANT EXPERIENCE

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### Experience Conducting Research on Local School Bond Measures

Our research has helped secure voter approval for more than 200 bonds totaling \$59 billion in general obligation bond funding for K-12 school districts. The depth and diversity of FM3's experience with California's local school districts represents an added value for Redlands USD. One such benefit is our firm's ability to provide, throughout the election cycle, an awareness of which educational messages and communications strategies prove to be effective in other California school districts.

Districts for whom we regularly provide research and consulting services include some of the largest and most ethnically and socioeconomically diverse in California, such as **San Diego Unified** (\$13.1 billion) and **Long Beach Unified** (\$4.4 billion), as well as dozens of mid-size and smaller districts, including **San Bernardino City Unified** (\$250 million).

In 2022 alone, FM3 helped raise \$11.8 billion in capital funding for 13 school and community college districts across the state. This includes work we did to help the Los Angeles Community College District pass a \$5.3 billion bond, the largest ever passed by any community college district in the country. Additionally, we are proud to have worked on successful bond measure campaigns in the following districts in 2022: **Cerritos CCD, College of the Sequoias CCD, Forestville USD, Little Lake City SD, Long Beach USD, Oakland USD, Pleasanton USD, Ravenswood CSD, Rialto USD, San Diego USD, Santa Rita USD, Selma USD, Twin Rivers USD, and Wiseburn USD.**

In addition to testing core concepts such as bond measure viability, voters' tax tolerance, optimal election timing, and voters' sense of a District's financial needs, our bond measure research works to achieve four key objectives:

- Quantitatively test voters' sense of urgency and priority for dozens of potential projects and expenditures, and then works collaboratively with District legal counsel to draft a 75-word ballot label that meets legal requirements while emphasizing as many of your voters' top priorities as possible.
- Assess the relative efficacy of a range of non-advocacy, public education statements to identify which themes and information will resonate most with voters in the context of public outreach efforts.
- Test the impact of finance measure opponents' potential criticisms to provide the District a quantitative assessment of which opposition arguments may be most damaging to a bond measure's standing among the electorate.
- Learn which sources voters use to get information about the District, and which public figures and organizations would prove the most credible as messengers about the District's bond measure.

### Statewide Education Funding Experience

FM3's experience with public opinion research for local school funding issues has also secured voter approval for seven statewide school bonds to provide more than \$34 billion in capital improvement funds for California's local schools and community colleges.

FM3 has also served as the lead research firm for the Coalition for Adequate School Housing (C.A.S.H.) for more than two decades. One particularly significant project we worked on with C.A.S.H., as well as the California Building Industry Association (C.B.I.A.) and others, was the successful statewide effort to pass Proposition 51, a \$9 billion statewide K-12 and community college bond, in the November 2016 Presidential Election.

Currently, we are also working with C.A.S.H. and C.B.I.A. to conduct polling on a \$14 billion statewide K-12/community college measure for the November 2024 election. Being on the ballot at the same time as a statewide measure is beneficial for local school bond measures because it is a time when the state is actively communicating with constituents about the needs of school districts and the importance of funding educational institutions.

## Regional Experience

As you may recall, FM3 has had the pleasure of working with Redlands Unified School District in the past, having conducted a community issues and budget priority survey in 2019 and a prior survey on a potential 2022 bond measure, which we found was not viable at the time.

FM3 has also regularly provided research for numerous public agencies and an array of business, nonprofit, advocacy, and political clients throughout San Bernardino County over the past 20+ years. Our team is therefore deeply familiar with not just the issues, but also the cycles and rhythms of local public opinion and its evolution over time. We would leverage this local knowledge, as well as our vast library of historic public opinion data to benefit the research we would design and conduct for the District.

Some of FM3's past clients in San Bernardino County have included:

- **Numerous County school districts:** In the past, we have conducted research for the Barstow Unified School District, the Chaffey Community College District, the Chino Valley Unified School District, the Etiwanda Unified School District, the Fontana Unified School District, the Ontario-Montclair School District, and the San Bernardino City Unified School District.
- **Various cities within the County:** In 2022 alone, our research contributed to the passage of multiple funding measures throughout the county—Measure R in the City of Montclair, Measure Q in the City of Ontario, and Measure A in the Rialto Unified School District. In the past, we have conducted research for the cities of Chino Hills, Highland, Montclair, and San Bernardino.
- **San Bernardino County Transportation Authority (SBCTA):** FM3 has conducted numerous projects for SBCTA over the years, many of which have included voters within Redlands USD.
- **Various San Bernardino County elected officials and political candidates:** The firm's high-profile local clients have included San Bernardino County Supervisor Joe Baca; former Supervisors Josie Gonzales, Barbara Riordan, and James Ramos; and former San Bernardino County Auditor-Controller/Treasurer/Tax Collector Larry Walker, among others.

## RECOMMENDED RESEARCH PLAN

### Research Specifications

For this project, FM3 recommends conducting a 15- to 20-minute dual-mode (telephone and online) survey among a randomized sample of 600 likely November 2024 voters within your community, like we did in our last survey for the District. Approximately 25% of likely November 2024 voters in the District are Latino, so we recommend conducting telephone interviews in both English and Spanish. To maintain cost effectiveness, online interviews will be conducted in English only.

We recommend utilizing three different contact methods (telephone calls, emails, and text messages) to provide an array of ways for potential respondents to participate in the survey. Providing multiple forms of contact also helps us engage historically disadvantaged communities that may not have adequate broadband access and/or access to computers or smart phones. Additionally, different demographic groups often have varying communication preferences—some may be more likely to answer a phone call than open an email or text message, and vice versa.

### Description of Methodology

The research process will begin with an initial kickoff meeting between FM3 and your project team. This meeting will provide an opportunity for an extensive review of relevant background information and context, as well as a detailed discussion of your objectives for the project.

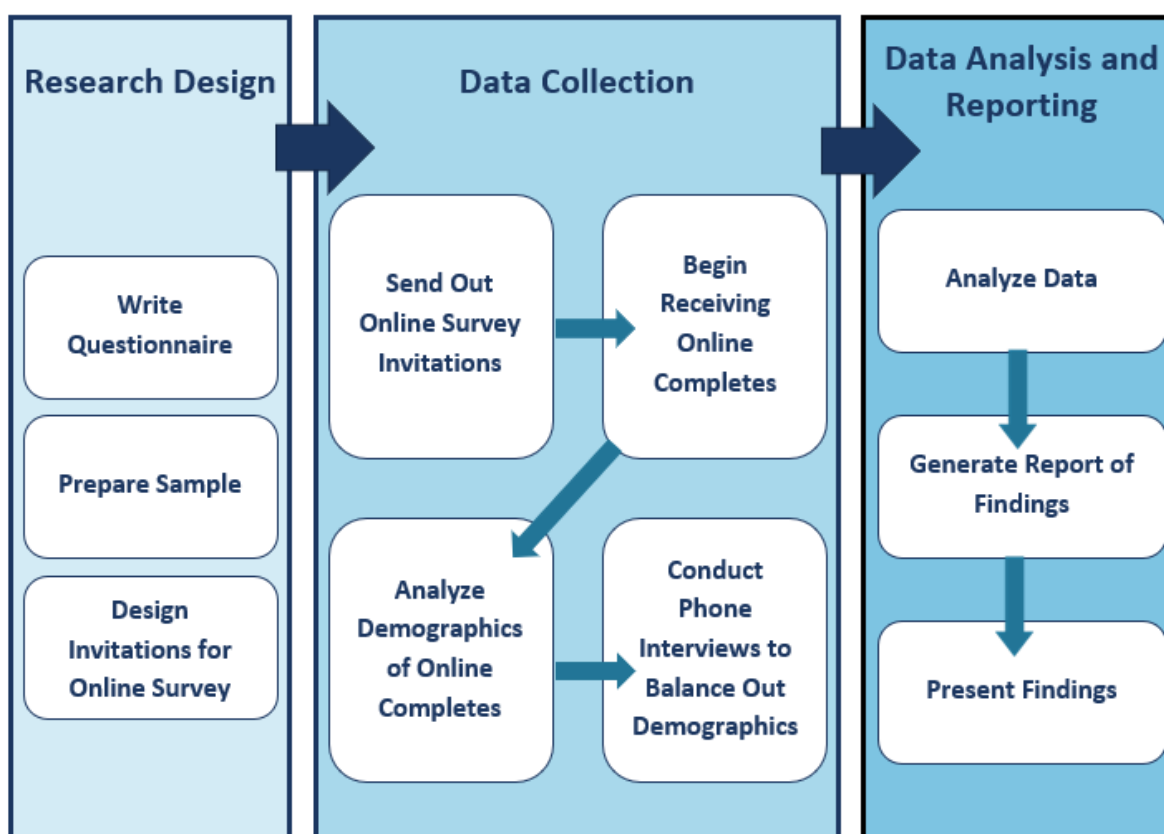
In designing a survey questionnaire for the District, FM3 will draw from its knowledge of public opinion survey methodology; our comprehensive review of the District’s past survey research (including tracking past questions when appropriate); your current and future objectives and needs; and our own vast library of research on education. We will proceed through several drafts, incorporating feedback from your team before each

<b>Methodology</b>	Dual-mode survey using a combination of telephone and online interviews
<b>Respondent Contact Method</b>	Telephone calls, email invitations, and text invitations
<b>Population &amp; Sample</b>	600 likely November 2024 voters within the District
<b>Margin of Sampling Error*</b>	±4.0% for a sample of 600 *At the 95% confidence level (i.e., in 95 out of 100 cases)
<b>Questionnaire</b>	15-20 minutes
<b>Languages</b>	Telephone interviews will be conducted in English and Spanish; online interviews will be conducted in English only.

revision, to develop a research instrument that will successfully obtain all the desired information. Among other questions, the survey will test:

- Basic awareness of the District;
- Attitudes about its job performance and need for additional funding;
- The viability of a bond measure based on a hypothetical 75-word title and summary;
- Relative support at different bond amounts/tax rates;
- The prioritization of various uses of potential bond funds;
- Informational messages that could help voters understand the value of the bond measure; and
- The vulnerability to common opposition themes.

FM3 will then construct a sample by pulling a random list of voters from the County voter file. Based upon the final sample specifications, FM3 will set a target number of interviews to be completed online. We will then send out email invitations to everyone with a valid email address. Within several days of the initial invitation distribution, we will examine the demographic and geographic characteristics of the online completes and then begin conducting telephone interviews to balance out the sample and target underrepresented subgroups. Additionally, we will send out a number of text invitations to help reach the overall target number of online completes and complement the other contact methods.



Once the survey is complete, FM3 will generate a detailed report of the survey results in a PowerPoint presentation, including demographic breakouts and summaries of key findings. These results are typically presented in draft format to the client team and then further refined based upon feedback from that group. A version of this presentation will also be developed in a format suitable for FM3 to present in a public forum.

## Deliverables

Upon conclusion of the survey project, the District will have received from FM3 each of the documents listed below. All documents can be provided in hard copy or electronic form (or both), depending on your preference.

- ✓ **Final survey questionnaire**
- ✓ **Topline survey results**
- ✓ **Verbatim answers to any open-ended questions**
- ✓ **PowerPoint presentation** (including key findings, results, conclusions, and actionable recommendations)
- ✓ **Presentations of results to staff, board members, or other stakeholders** (in person if desired)

Finally, after FM3's final deliverables have been completed, we will remain available to answer follow-up questions and to present results to additional key stakeholders. We view the responses to the survey as an ongoing data resource; if needed, FM3 can conduct further analysis to provide answers to any follow-up questions.

## Estimated Costs

The chart below contains the total estimated costs for this research. These prices are comprehensive and include all costs for questionnaire design, sample acquisition and preparation, translation, programming, survey invitations, survey hosting, bilingual telephone interviewing, data entry and analysis, and reporting.

Survey Length	600 Interviews
15 minutes	\$39,850
20 minutes	\$45,750

## CONTACT INFORMATION

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Thank you for taking the time to review our proposal. Please feel free to contact us with any questions.



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