



***PROPOSAL TO PROVIDE
CONSULTING SERVICES***

***For a Potential General Obligation Bond
Redlands Unified School District***

November 1, 2023

To: Assistant Superintendent Jason Hill
Redlands Unified School District
Date: November 1, 2023



Dear Assistant Superintendent Hill:

The Lew Edwards Group (LEG) is pleased to submit this proposal to continue to provide Consulting Services to the Redlands Unified School District (District) in 2023. A partnership with LEG continues to offer Redlands USD the following:

- A firm that has **enacted over \$42 Billion in school bond** and California tax measures **with a 95% success rate**;
- A firm that has enacted **over \$4 Billion in San Bernardino County** for clients including K-14 districts such as Fontana USD, Rialto USD, San Bernardino USD, Victor Valley CCD, and more;
- A communications firm representing California's diversity and offering **nationally recognized, award-winning** outreach; and
- Experts with decades of experience in school funding projects offering dedication and enthusiastic teamwork to the District's vision.

We join California Financial Services in our continued team commitment to seeing whether the high turnout Presidential Election is the right time for us to make your bond vision a reality.

Sincerely,

Catherine Lew, Esq.

Co-Founder & Principal Consultant

Catherine@lewedwardsgroup.com

(510)594-0224 x 261

REFRESHER ON THE LEW EDWARDS GROUP

While LEG worked with you in 2022, as the District has a new Superintendent the below is a refresher on our team.

Established in 1997, **The Lew Edwards Group (LEG)**, a California corporation, is a nationally recognized, award-winning California leader in designing and implementing effective bond preparation programs for school districts, community college districts, and other public agencies. LEG prides itself on providing individualized, quality service to each of our clients. LEG offers unsurpassed experience in representing public agencies, college districts and school districts on their strategic communications and outreach needs.

LEG has an extensive track record of designing innovative strategic outreach and bond preparation programs and winning elections for school districts across the State of California. LEG has served as the consultant for school districts of varying sizes – ranging from Ross Valley School District, an exclusive, high-performing district in Marin County – to the Los Angeles Unified School District, a large urban school district for which LEG managed four successful bond communications programs, raising billions in revenue. More than two-thirds of LEG's practice supports school districts and public agencies seeking successful bond, parcel tax or other revenue measures.

LEG experts are experienced professionals from disciplines such as communications, direct mail, media relations, community relations, government affairs, coalition building, and education campaigns. LEG's outstanding education communications products have been recognized numerous times in prestigious national awards such as the Pollie and Golden Paragon competitions. LEG's senior leadership have been past presenters at industry conferences such as the Coalition for Adequate School Housing (CASH) and California Latino School Boards Association, among others.

Selected Lew Edwards Group Experience and Track Record

| | |
|---|------------------------------|
| Alhambra Unified School District | \$259 Million in Bonds (two) |
| Arcadia Unified School District | \$218 Million Bond |
| Barstow Unified School District | \$39 Million Bond |
| Beaumont Unified School District | \$125 Million Bond |
| Butte College | \$190 Million Bond |
| Centinela Valley Union High School District JPA | 2 cents/sq.ft. Parcel Tax |
| Central School District | \$35 Million Bond |
| Central Union High School District | \$30 Million Bond |
| Ceres Unified School District | \$60 Million Bond |
| Chaffey Joint Union High School District | \$848 Million Bond |
| Chino Valley Unified School District | \$750 Million Bond |
| Coast Community College District | \$698 Million Bond |
| Colton Joint Unified School District | \$225 Million Bond |
| Compton Community College District | \$100 Million Bond |

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| Contra Costa County Community College Dist. | \$450 Million Bond |
| Cuesta College | \$275 Million Bond |
| El Camino Community College District | \$350 Million Bond |
| El Monte Union High School District | \$190 Million Bond |
| Emery Unified School District | \$95 Million Bond/15 cents/sq.ft. Parcel Tax |
| Etiwanda School District | \$137 Million Bond |
| Eureka City Schools District | \$49.7 Million Bond |
| Fontana Unified School District | \$275 Million Bond |
| Foothill – De Anza Community College District | Current Client |
| Fremont Unified School District | \$650 Million Bond |
| Helendale School District | \$20 Million Bond |
| Little Lake School District | \$36 Million Bond |
| Lodi Unified School District | \$281 Million Bond |
| Long Beach City College | \$850 Million Bond |
| Long Beach Unified School District | \$2.7 Billion in Bonds (two) |
| Los Angeles Unified School District | \$14+ Billion in Bonds |
| Los Banos Unified School District | \$44 Million Bond |
| Los Nietos School District | \$28 Million in Bonds (two) |
| Lynwood Unified School District | \$93 Million Bond |
| Manteca Unified School District | \$159 Million Bond |
| Merced City School District | \$60 Million Bond |
| Mt. SAC Community College District | \$1.1 Billion in Bonds (two) |
| Mt. San Jacinto Community College District | \$295 Million Bond |
| North Orange County Community College District | \$574 Million Bond |
| Norwalk-La Mirada Unified School District | \$540 Million in Bonds (two) |
| Oakland Unified School District | three \$120 Parcel Taxes |
| Ohlone Community College District | \$499 Million in Bonds (two)/current client |
| Ontario Montclair School District | \$150 Million Bond |
| Paramount Unified School District | \$206 Million in Bonds (two) |
| Paso Robles Joint Unified School District | \$95 Million Bond |
| Peralta Community College District | \$800 Million Bond/\$8 Million Parcel Tax |
| Rialto Unified School District | \$340 Million Bond |
| Ross Valley Unified School District | \$41 Million Bond |
| San Bernardino City School District | \$250 Million Bond |
| San Leandro Unified School District | \$39 Parcel Tax |
| San Mateo – Foster City School District | \$148 Million Bond |
| Santa Monica – Malibu Unified School District | \$268 Million Bond |
| Solano Community College District | \$348 Million Bond |
| Sonoma Valley Unified School District | \$40 Million Bond |
| Southwestern Community College District | \$389 Million Bond |
| Spreckels Union School District | \$7 Million Bond |
| Tahoe Truckee Unified School District | \$5.6 Million/year Parcel Taxes (2) |
| Temple City Unified School District | \$128.8 Million Bond |

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|--|----------------------------|
| Victor Elementary School District | \$150 Million Bond |
| Victor Valley Community College District | \$297.5 Million Bond |
| Victor Valley Union High School District | \$500 Million Bond |
| West Valley-Mission Community College District | \$1 Billion in Bonds (two) |
| Westminster School District | \$130 Million Bond |

KEY CONSIDERATIONS

New Dynamics Since 2022

The below Key Considerations are instructive for your planning moving forward, which are all new for any District potentially looking at the 2024 ballot.

Cost of Living Issues: It is currently unclear how severe pocketbook issues and voter fears over the economy will be in 2024. If the cost of living continues to rise, affecting basic groceries and gas, the environment may shift downward. In past years of this type, LEG has worked with its to build broad coalitions that include employers, business influentials, or labor organizations due to the local economic stimulus and educational affordability these types of education bonds support.

Competition on the Ballot if proceeding in November: As it is a Presidential Year, additional statewide and regional items on the ballot should be anticipated. Any State or regional measures that also ask for money may affect your planning, something to watch for in the coming months. Currently a State climate change bond and a State education bond are expected on the November state ballot.

And of course, the Business Roundtable-sponsored Taxpayer Protection Act is currently on the 2024 docket. As you are aware, it has qualified. This highly polarizing, anti-tax statewide proposition on the ballot at the exact same time as your potential bond could very well affect your viability due to the aggressive anti-tax messaging anticipated by its proponents, something to plan for. Due to insider jockeying, it is not a foregone conclusion that it will remain on the ballot. If it does, get ready for a toxic food fight with Democrats who have advanced ACA 13 as a response to the TPA.

Informational Techniques: With mail ballot voting implemented since COVID, more people are getting their information online. To be competitive, LEG's clients include approaches that go far beyond USPS mail or simply boosting a Facebook post.

Traditional online and USPS outreach are still essential components of a multi-disciplinary outreach program, particularly since these are avenues that older voters are more likely to visit. Of course, your Communications Toolkit will need to include all traditional social media platforms.

LEG is advising its clients to augment or expand their paid digital media reach and communications considering today's multi-faceted communications. Specifically, LEG's clients are overlaying voter audiences onto the platforms and using static banners and short videos- approaches which can be discussed further in our 2024 effort.

Post-Placement Considerations

Advocacy Campaign Funding Considerations: Now that California has implemented an all-mail ballot format, the sheer number of people voting by mail means that your election could very well be decided the month prior to and well before “traditional” Election Day. For this reason, LEG calls these “October” (not November) elections.

In this environment, LEG’s campaign committees now prepare for four bell-shaped curve weekends of voting in October, as voters will be receiving their ballots in the month preceding the election and voting throughout those weeks. This means once the efforts shift to an advocacy committee independent of the District’s efforts, the entirety of the campaign budget should be secured by October 1st.

Changes in legislation: AB1416, known as the Ballot DISCLOSE Act, became effective this year. It requires the names of individuals, businesses or organizations supporting and opposing a **state** ballot measure to be added in the County ballot handbook as well as the ballot label, and a county could then also choose to include this type of information on the ballot for local ballot measures as well.

The legislation states supporters/opponents are to be added to the “ballot label,” and each support/oppose section gets 125 characters to use. For those County ROV’s choosing to remain opted in, a listing of a given measure’s supporters and opponents will be printed immediately following the 75-word ballot question.

Counties will not be reimbursed by the State for the extra costs of including this information, which will lengthen the actual ballot, impacting printing and postage costs. Checking in with your County Registrar of Voters on whether they will be opted in, to this state requirement or not, will be important as part of your planning process.

OBSERVATIONS OF DISTRICT’S PAST ASSESSMENT PROJECTS

Demographics

LEG’s last two projects with the District have been illuminating with regard to the opportunities and challenges here, beginning with demographics.

While the District is plurality Democrat, LEG considers it a “swing” district:

- 38% of registered voters are Democrats
- 33% are Republican
- While the balance are No Party Preference, in our experience in your region these voters will tilt conservative
- 26.3% are Latino, a helpful demographic that is often a “base” vote for these types of measures

Past Research Findings

While we have found the District had strong name recognition and good approval ratings, the percentage recognizing your funding needs was far lower than some of our other districts. Respondents gravitated to narratives and projects related to:

- ✓ Age of the schools and basic repairs
- ✓ Preparing students for 21st century jobs
- ✓ Upgrading STEM classrooms and labs

Strongly effective thematic included:

- ✓ Maintaining local control over funding;
- ✓ Retaining and attracting quality teachers;
- ✓ Upgrading schools to prepare students for high school, college, and career

For current polling/assessment strategies LEG is currently leading for other districts, these priorities and themes continue to be highly effective.

Past Viability

Having worked with CFS, the District and FM3 Research to assess viability in 2020 and 2022, potential viability was definitely higher in the 2020 survey. LEG attributes this in no small part to the higher turnout Presidential turnout demographics—an opportunity that should not be overlooked for 2024. The 2022 viability was significantly lower and could not withstand opposition.

As the overall environment in 2024 is far more polarized, clearing the decks of potential opposition will be critical for your District, particularly with the considerations of the AB 1416 DISCLOSE ACT in mind.

Scope of Services

The following is the proposed approach LEG recommends. Of course, as a first step the District would need to update its opinion research polling and LEG will confer with CFS and FM3 Research to add value during the critical opinion research phase.

Update Opinion Research Polling, Determine Bond Feasibility (LEG and FM3 Research)

- ❑ Conduct survey interviews
- ❑ Assess bond viability
- ❑ Develop Strategic Recommendations and advise District of results
- ❑ Create Project Planning Timeline once consensus is reached on timing

Internal and External Outreach Efforts

- ❑ Review database of external Key Influentials

- ❑ Conceive and write updates on school needs for external Influentials
- ❑ Recommend District Stakeholders engagement to inform them of school needs
- ❑ Recommend External Community Opinion Leaders engagement to inform them of school needs
- ❑ Conduct analysis of parent voting patterns
- ❑ Develop nonpartisan, Parent Voter Registration and Participation Project
- ❑ Develop and implement bilingual outreach for District families as appropriate
- ❑ Create outreach plan to business and community leaders, and other influentials

Develop/Refine Informational Materials and Community Outreach Activities

- ❑ Evaluate any existing District community outreach materials and activities
- ❑ Design and create informational (nonpartisan) program materials:
 - District Accountability Report
 - General priorities/needs GO Bond fact sheet
 - School-site specific GO Bond fact sheets, as appropriate
 - Commonly Asked Qs/As
 - Power Point Presentation for Informational (nonpartisan) Speakers' Bureau program
 - Update District Website Links about School Priorities, Needs, GO Bond information
 - Update and place information on School-specific sites, as needed
 - Determine appropriate bilingual messaging and materials, as needed (District to provide translation)

Districtwide Communications and External Community Publications

- ❑ Design District Informational Mailers for dissemination to the community-at-large (District to translate, print/mail at its own expense, using its own vendors. A sample of a mailer we worked together on one of our earlier engagements is included in the Appendix to this proposal.)
- ❑ Create Earned Media Strategy for balanced press coverage
 - Copy write press releases and media backgrounders
 - Copy write Guest Columns
 - Brainstorm ways to pitch story ideas
 - Conduct media training as helpful to District staff
- ❑ Develop information for dissemination on Social Networking/E-vehicles (such as Twitter, YouTube, Vimeo, Facebook and more)
- ❑ Copy write District Stakeholder updates (internal to staff, parents)

District Support

- ❑ Design Speakers' Bureau Toolkit/Training Packet for external Informational presentations
- ❑ Conduct training for District Superintendent, Cabinet, and Staff for external Informational presentations
- ❑ Work with District Counsel to provide Helpful Hints on District "Do's and Don'ts"
- ❑ Review District's Voter Handbook Submittals and work with Bond Counsel and District to finalize Ballot Measure language

Summary of Professional Fees and LEG-Related Project Costs

LEG's professional fee for its services is \$6,500 per month effective November 2023 through August 2024. Consistent with our previous collaborations, LEG does not bill on an hourly or time and materials basis. Professional fees are in addition to hard project costs for polling, and other expenses specified below.

Lew Edwards Group Consulting Fee \$65,000

- *For a 10-month term*
- *As in our past collaborations, should the District suspend planning only the fees incurred through suspension date will be invoiced*

Graphic Design for Informational Mailings NTE \$10,000

- *For graphics for up to three mailings*
- *Cost does NOT include translation, as use of the District's translator/local vendor is presumed*
- *The District should print/mail its own materials and will need to budget its own printing, mail house and postage separately outside of this agreement*

Mailing Data/Parent Registration Match NTE \$1,000

Summary of Fees/LEG Costs NTE \$76,000*

**As noted, aside from mailing data/graphics, assumes all other production costs such as print/mail/postage, and translation will be budgeted for separately and performed by District vendors for printed collaterals.*

Of course, these costs also do not include campaign consulting services or budgets that are developed under a separate contract with a campaign committee.

The Lew Edwards Group would like to thank the Redlands Unified School District for its consideration and our past engagements.

[MAILING SAMPLE ON NEXT PAGE]

IMPORTANT INFORMATION

about YOUR Local Schools



Dear Neighbor:

As Superintendent, I am proud of our award-winning schools. Our local schools are committed to providing every student with a well-rounded, rigorous education.

We know that if we want to maintain academic excellence and career preparation, we must prepare students to compete in the technologically advanced, highly competitive 21st century economy in a safe learning environment.

While we take excellent care of our schools, over 60% are over 50 years old, and some students attend classrooms in portables over 30 years old. There are urgent basic repairs and upgrades needed so we can continue to prepare students with the skills they need to succeed in college and in today's high-tech, highly competitive economy.

As we work to address these needs, we want to hear YOUR priorities for local schools. Please help us plan by taking a moment to provide your input on the attached form or participate online at Redlandsusd.net/page/17216.

Sincerely,

SUPERINTENDENT MAURICIO ARELLANO
Redlands Unified School District

COMMUNITY FEEDBACK SURVEY

To maintain quality education in a safe learning environment, we need your input.
Please prioritize the below, with 5 being the most important to you.

- _____ Improve student access to instruction in science, technology, engineering and math
- _____ Address mold, asbestos, lead paint, leaky roofs and help ensure safe drinking water
- _____ Continuing to attract and retain quality teachers
- _____ Repair deteriorating schools and classrooms
- _____ Upgrade schools to prepare students for high school, college and careers
- _____ Improve school security and upgrade emergency communications systems
- _____ Other _____

Question/Comment: _____

☐ **KEEP ME INFORMED.** (Your information will not be shared)

NAME _____

ADDRESS _____

CITY _____

STATE _____

ZIP _____

EMAIL _____