



VOTER OPINION SURVEY
PROPOSAL & LETTER OF AGREEMENT

PREPARED FOR
PERRIS UNION HSD



AUGUST 2023



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RESEARCH PROPOSAL

True North Research, Inc. (True North) is pleased to be Perris Union High School District's (District) research partner for the forthcoming bond feasibility survey. Our recent conversations and our prior work with the District (Measure W) 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.

PROJECT UNDERSTANDING & INNOVATIVE APPROACH 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 and sound, strategic advice. The overriding objective of the survey is thus to produce an *unbiased, statistically reliable* evaluation of voters' interest in supporting a local bond measure, as well as identify how best to align the measure with community priorities and position it for voter approval.

If the ultimate goal of this study is to enable the District to make sound, strategic decisions based upon the data that is collected, it is critical that the data be collected according to rigorous methodological standards. Indeed, although it may be easy to conduct a 'survey', it is quite challenging to design and implement a survey that A) produces *valid*¹ and *reliable*² measures of the opinions and behaviors of interest, and B) produces data that is *representative*³ of the population of individuals that is the focus of a study. Only by satisfying each of these conditions will the proposed study produce data that is trustworthy and thus a sound basis for making decisions.

Meeting the aforementioned conditions has become more difficult in recent years. Much has changed in terms of how the public receives information, the accessibility of residents through traditional recruiting methods, and their willingness to participate in community surveys. Caller-ID, SPAM filters, habitual call-screening, and busy lifestyles have made it more difficult to reach respondents in general, leading to lower response rates and greater response bias when relying on just one or two recruiting methods. In order to continue producing statistically reliable measures of their voters' opinions, priorities and behaviors, the research methodologies that public agencies employ for surveys must adapt to these new challenges.

The methodology that we propose is designed to do just that—adapt to these challenges by employing innovative techniques that will ensure statistically reliable results. We propose to use a **stratified and clustered random sampling methodology** that ensures a representative sample of likely March 2024 and November 2024 voters within the district regardless of whether

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1. Validity refers to the degree to which a question actually measures the underlying attitude or construct that it was designed to measure. For example, asking people whether they own "stock" to measure their financial savings behavior is sufficiently ambiguous such that it has low validity. Research has shown that people in farming communities are more likely to interpret "stock" to mean livestock—not financial stocks.
 2. Reliability refers to the degree to which the observed results for a survey question are free of measurement errors and thus accurately measure the true value among the survey participants.
 3. In this context, representative refers to the degree to which the results found among the survey participants match what would have been found if all likely voters participated in the survey. A probability-based sample free from the many possible sources of selection bias is the key to obtaining representative results.

they use mobile phones, land lines, email, or all of the above. We also recommend using **three recruiting methods** (email invitations, text invitations, and telephone calls) to recruit participation in the survey and a **mixed-method data collection methodology** that allows sampled respondents the flexibility of participating online at a password protected web site, or by telephone if preferred. Designed, tested and refined by True North over the past 10 years, our recommended survey approach has proven to increase participation rates, reduce response bias, better engage traditionally hard-to-reach subgroups, and increase the overall accuracy and reliability of voter survey results when compared to using fewer recruiting methods.

SCOPE OF WORK 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 random sample of voters who—based on their voting history and registration status—are likely to participate in the elections of interest (November 2024, with March 2024 subset).
- 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.
- Professionally translate the survey into Spanish to allow for data collection in English and Spanish.
- Web program the finalized survey instrument to allow respondents to participate online at a secure, password-protected survey site.
- CATI (Computer Assisted Telephone Interviewing) program the same survey instrument to ensure accurate and reliable data collection for respondents who prefer to participate by telephone.⁴
- Recruit voters to participate in the survey using a combination of email invitations, text invitations, and telephone calls.
- Collect at least 500 quality interviews according to the sampling plan and a strict interviewing protocol.⁵ It is expected that the average interview will last between 15 to 17 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.

4. All recruiting and data collection conducted by telephone is performed by live, professional interviewers. We do not use robocalls.

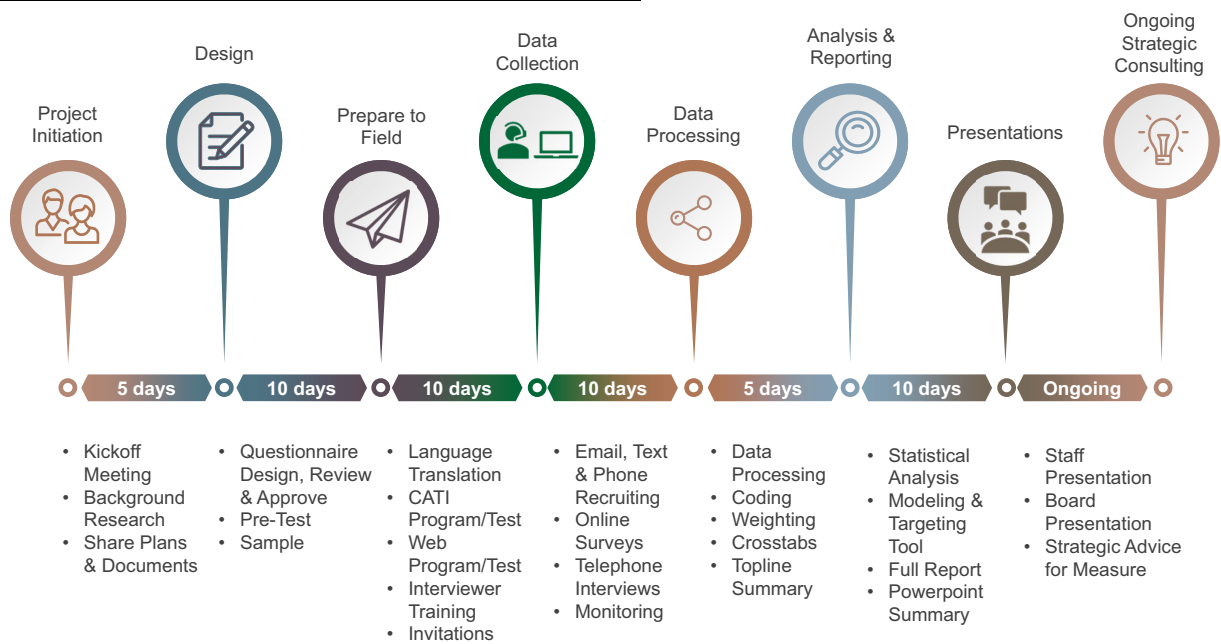
5. Any additional interviews beyond 500 will be provided to the District at no additional charge.

- 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 via Zoom or similar platform.
- 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 \$29,850. This cost is inclusive—there will be no additional charges associated with the study.

SURVEY TIME LINE True North will work with Perris Union High School District to establish a project schedule that meets the District’s needs. Below is a typical time line for a bond feasibility survey that shows the stages of a bond survey project, the number of days that we recommend devoting to each stage, as well as the key research tasks that are completed in each stage. We have the flexibility and resources to adjust this time line if the District desires.

FIGURE 1 PROPOSED TIME LINE



ABOUT TRUE NORTH For the past 20 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 1,200 survey research studies for public agencies in California, including more than 400 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 bonds and tax measures over the past decade (95%), including 100% success in six of the past eight election cycles including November 2020 and June 2022. In total, the research that True North has conducted has led to over \$35 billion in successful local revenue measures.

PROJECT MANAGER True North’s President (Timothy McLarney, Ph.D.) will serve as the Project Manager for the proposed survey. He will be the District’s day-to-day contact for all matters related to the study and will lead all design, analysis, reporting, and presentation tasks. Approximately 75% of the research tasks will be performed directly by Dr. McLarney.

Dr. McLarney has more than 25 years of experience in survey methodology, statistics, public opinion analysis, and providing data-driven strategic advice to public agencies. His work to date has provided California school districts, colleges, universities, cities, counties, special jurisdictions, transportation planning agencies, councils of government, and political campaigns with research to address their often complex marketing, planning, performance measurement, and tax measure needs. During his career, Dr. McLarney has occupied a lead role in over 1,200 research studies, more than 400 of which had research objectives similar to those of Perris Union High School District.

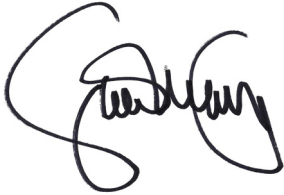
Dr. McLarney is a nationally recognized expert in survey research methodology, sampling theory, weighting, and the use of statistical methods to generalize survey results. His research has been published in academic journals and has earned him honors including the title of Visiting Scholar at the Institute of Governmental Studies at UC Berkeley. He has also served as an independent expert witness in survey research methodology for California legal cases. Dr. McLarney earned his Ph.D. and M.A. in Government from Cornell University with an emphasis in survey methodology, sampling theory and public opinion analysis, 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 Perris Union High 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 2. 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,

Agreed to and accepted by:



Timothy McLarney, Ph.D.
President
True North Research
1592 N Coast Highway 101
Encinitas CA 92024

Candace Reines
Deputy Superintendent, Business Services
Perris Union High School District
155 E 4th Street
Perris, CA 92570

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.

<i>Merger</i>	The merger or consolidation of the client into or with any other entity shall not terminate or otherwise modify this Agreement.
<i>Ownership of Materials</i>	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.
<i>Independent Contractor</i>	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.
<i>Amendment Provision</i>	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.
<i>Successors</i>	Any agreement between the agency and a client shall be binding upon, the heirs, successors and assignors of the parties.
<i>Termination</i>	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).
<i>Attorneys' Fees</i>	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.
<i>Governing Law</i>	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.