

BOND FEASIBILITY TRACKING STUDY

CONDUCTED FOR THE
ORANGE UNIFIED SCHOOL
DISTRICT

PRESENTED BY
TIMOTHY McLARNEY PH.D.

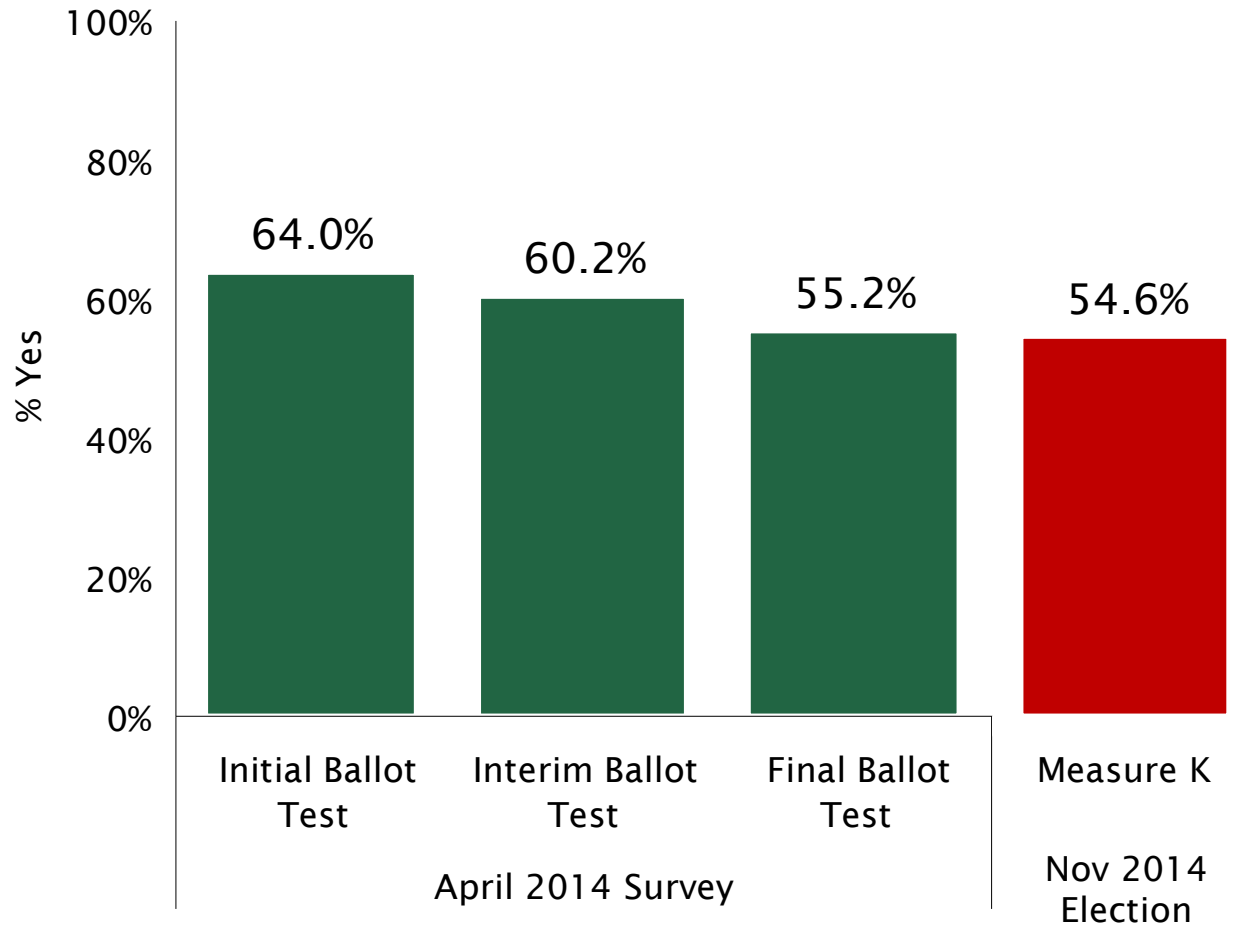
7/14/2016



HISTORICAL PERSPECTIVE: 2014

- Telephone survey
- Conducted March 28 to April 1, 2014
- 400 District voters likely to participate in November 2014 election, with likely June 2014 subset
- Overall margin of error of $\pm 4.89\%$

2014 SURVEY AND ELECTION DAY





2014 SURVEY AND ELECTION DAY

	2014 Survey Final Ballot Test	2014 Election Day Result	Difference
Districtwide	55.2%	54.6%	-0.6%
Canyon	55.9%	54.6%	-1.3%
El Modena	56.8%	55.3%	-1.5%
Orange	60.3%	61.5%	+1.2%
Villa Park	47.6%	47.8%	+0.2%

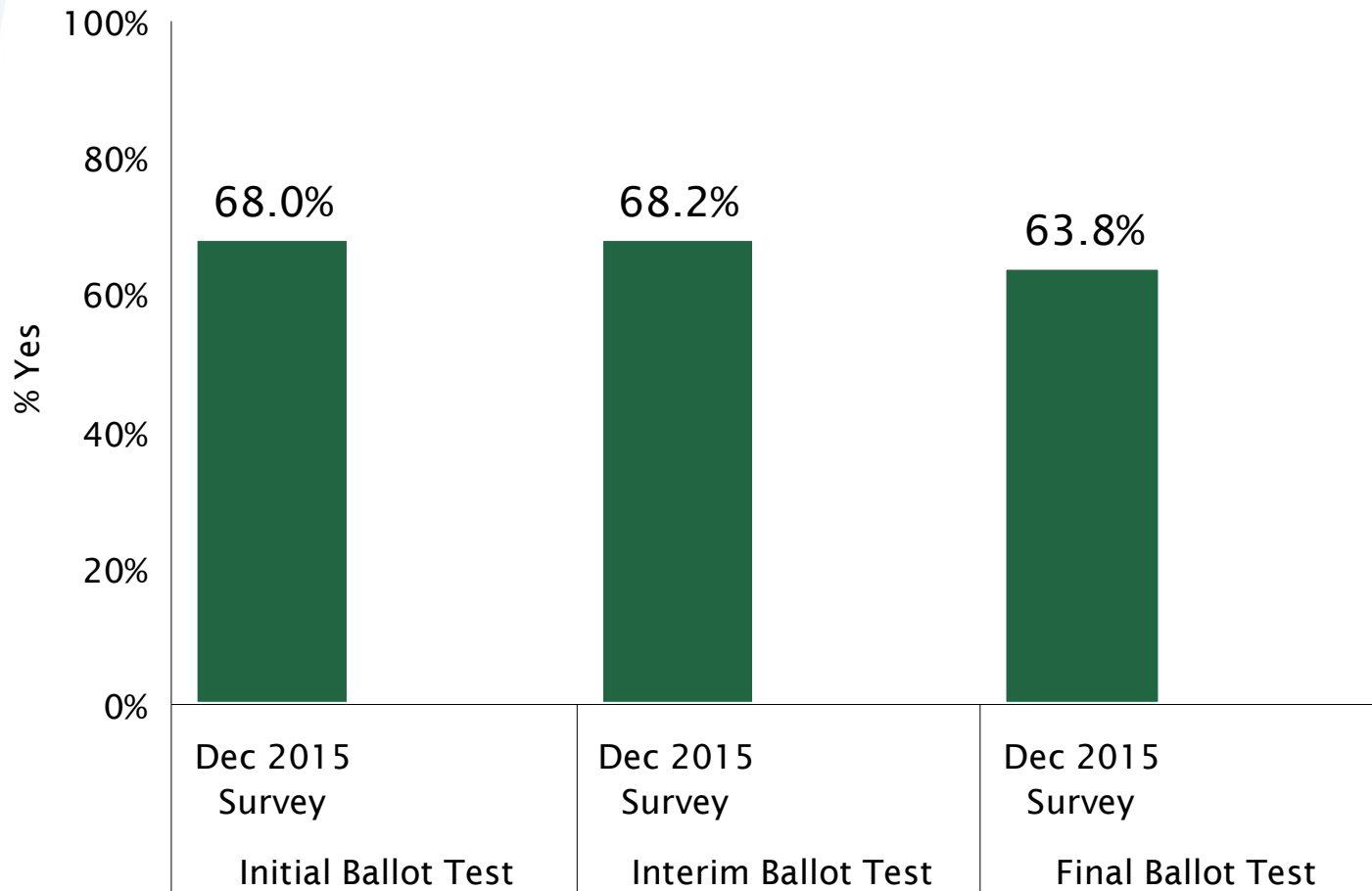


HISTORICAL PERSPECTIVE: 2015 BASELINE

LIGHT PRESSURE

- Telephone survey
- Conducted December 2015
- 18 minute average
- 800 District voters (200 from each High School attendance area) likely to participate in November 2016 election, with June 2016 subset
- Overall margin of error $\pm 3.4\%$, within each attendance area approximately $\pm 6.9\%$

RECENT SURVEYS: DEC 2015



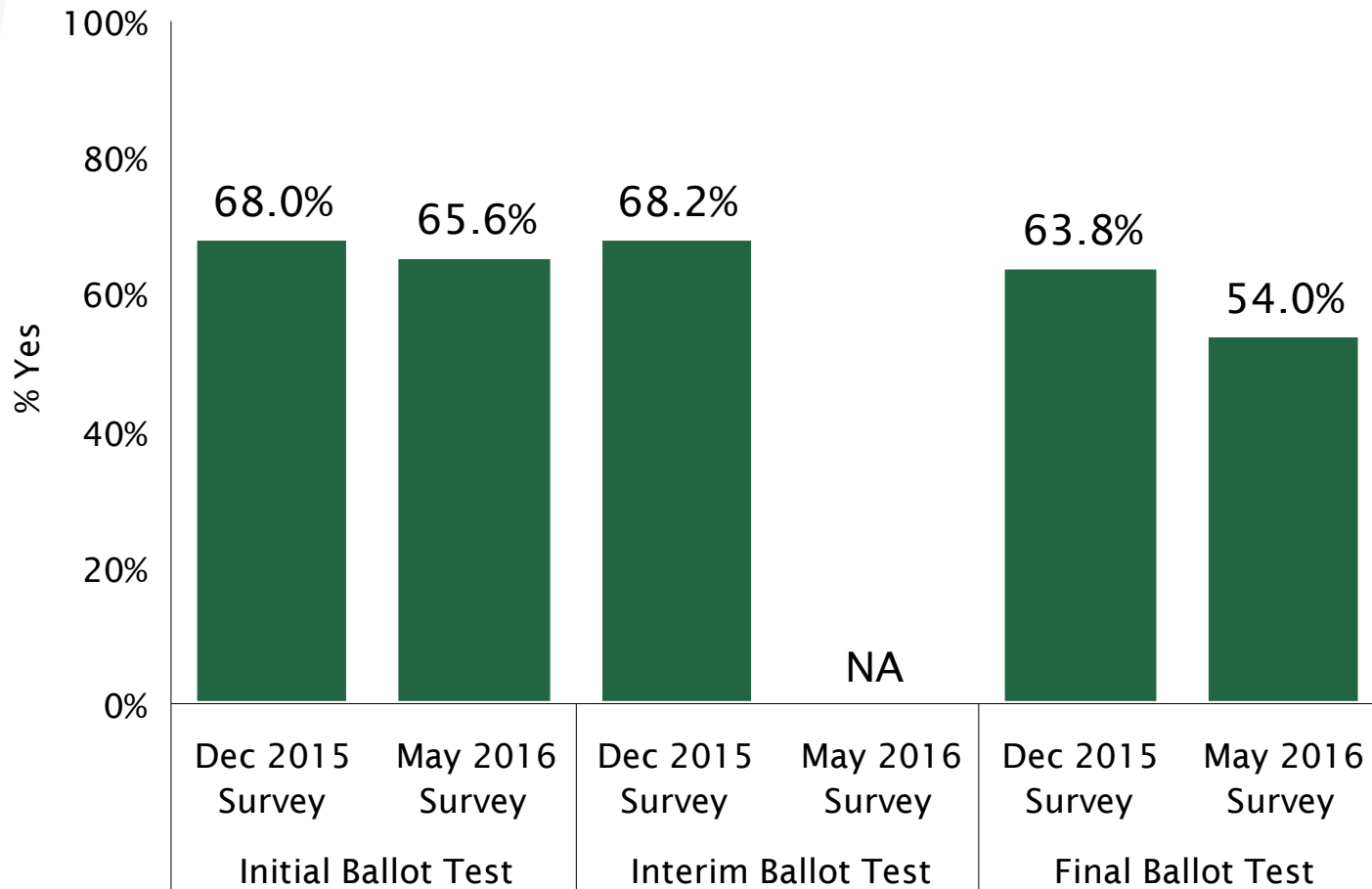


HISTORICAL PERSPECTIVE: 2016 TRACKER

HEAVY PRESSURE

- Conducted April 29th to May 11th, 2016
- Sample: 715 District voters likely to participate in November 2016 election
- Mixed-Method approach
 - Recruited via phone and email
 - Data collection via phone and online
- 12 minute average interview length
- Overall margin of error is $\pm 3.7\%$

RECENT SURVEYS: DEC '15 & MAY '16





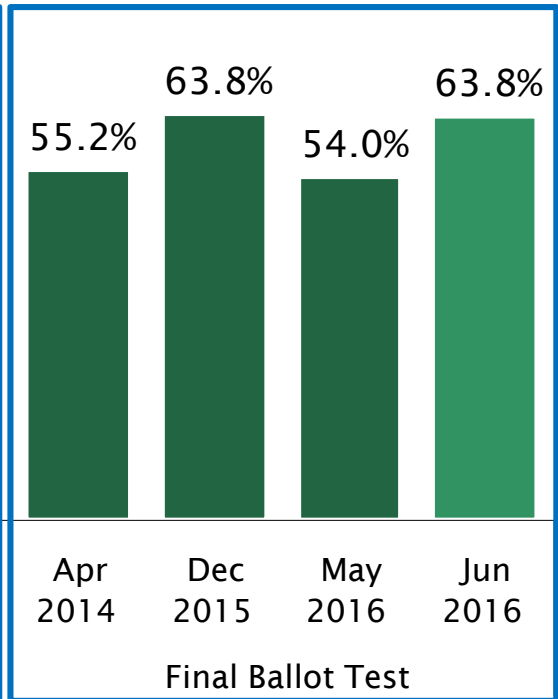
CURRENT TRACKING SURVEYS

LIGHT PRESSURE

- Conducted June 20th to July 3rd, 2016
- Sample: Likely Nov 2016 voters
- Three separate surveys testing three types of measures
 - 483 Districtwide bond
 - 334 Orange & El Modena (SFID bond)
 - 332 Canyon & Villa Park (SFID bond)
- Mixed-Method approach
 - Recruited via phone and email
 - Data collection via phone and online
 - 15 minute average interview length
- Overall margin of error
 - Districtwide \pm 4.5%
 - SFIDs \pm 5.3%

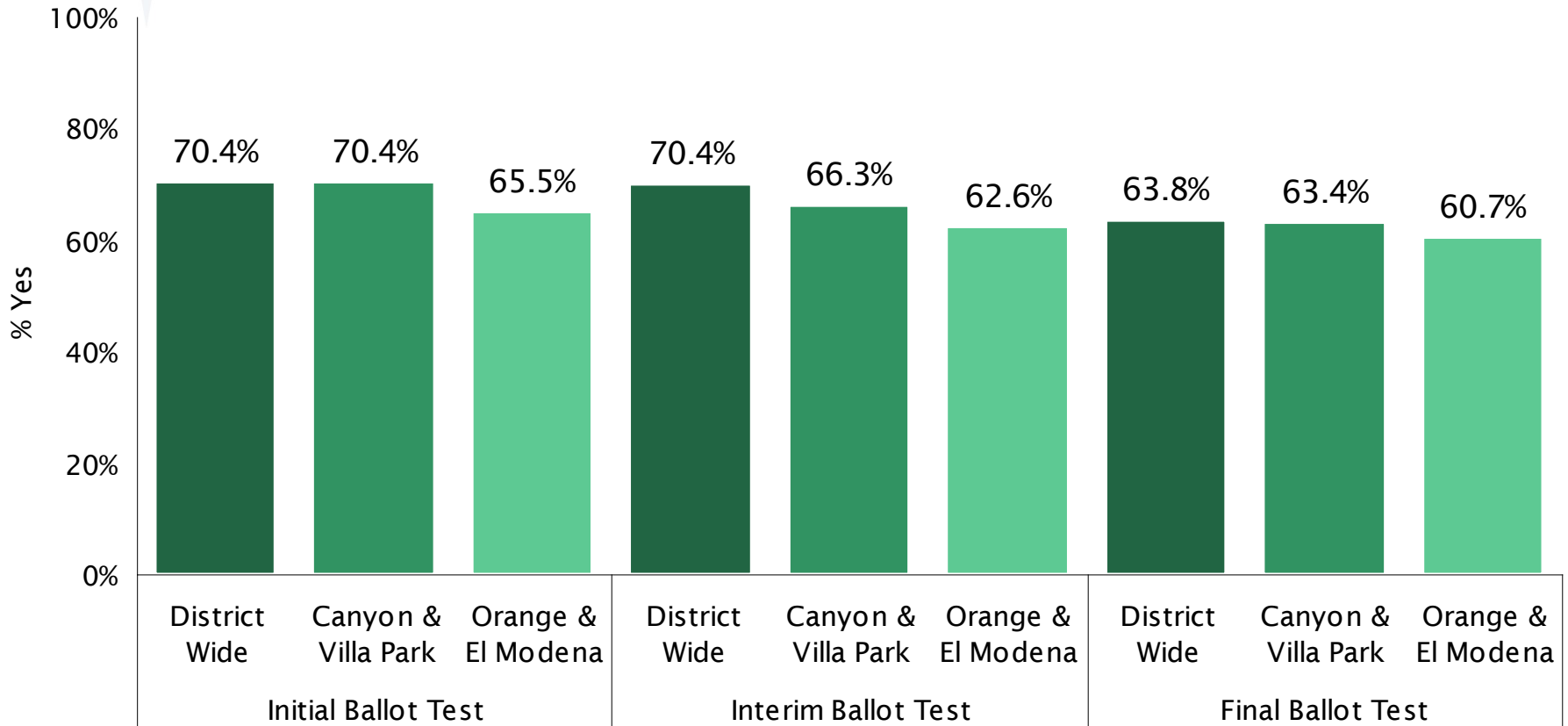
DISTRICTWIDE BOND '14-'16 SURVEYS

- Final Ballot Test is the scenario to pay attention to as it assumes some level of opposition/competition
- Surveys consistently show that OUSD voters' support for bond depends on the election scenario
 - Light pressure: 64%
 - Heavy pressure: 54%/55%

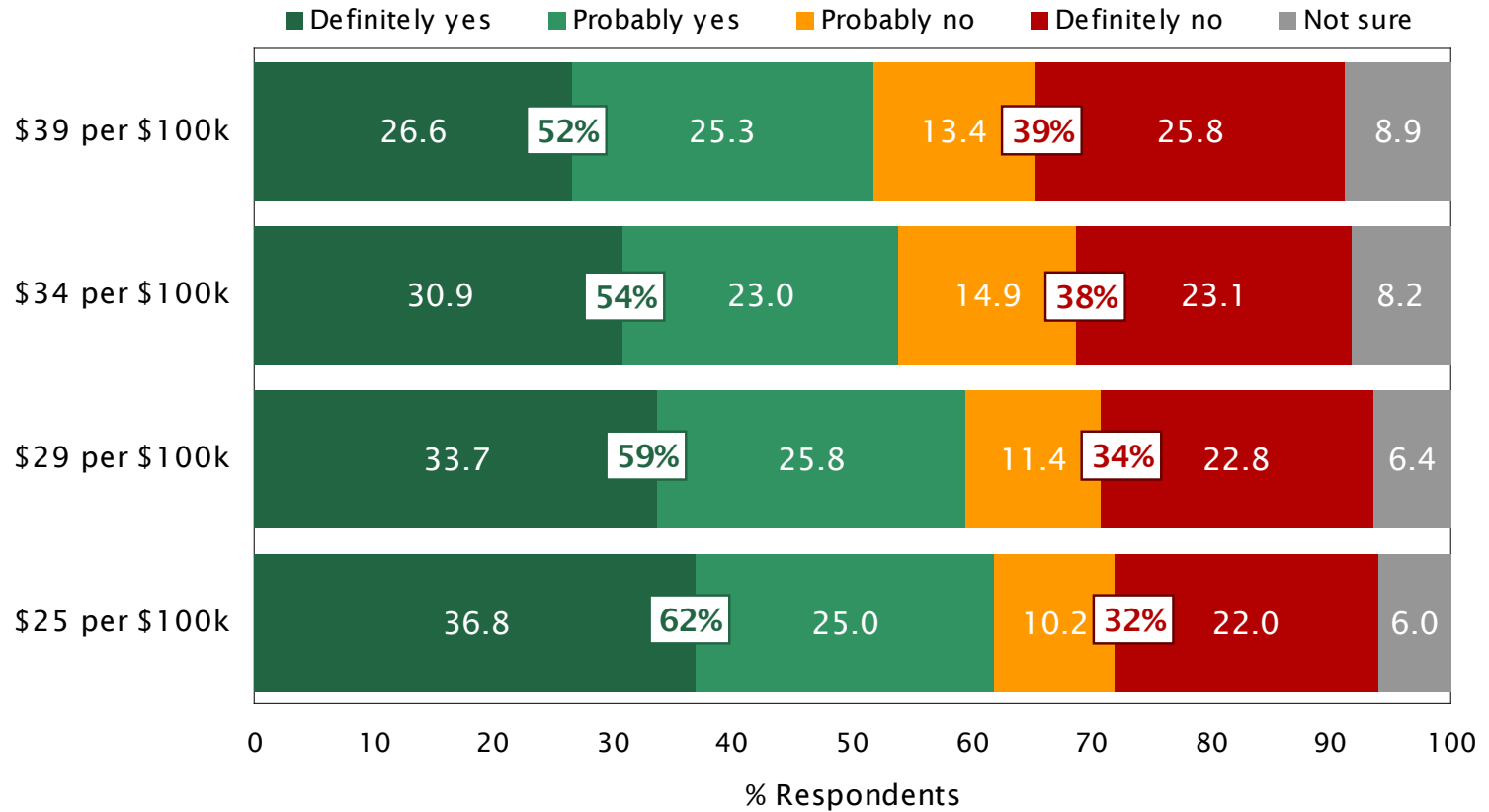


DISTRICTWIDE VS. SFIDS

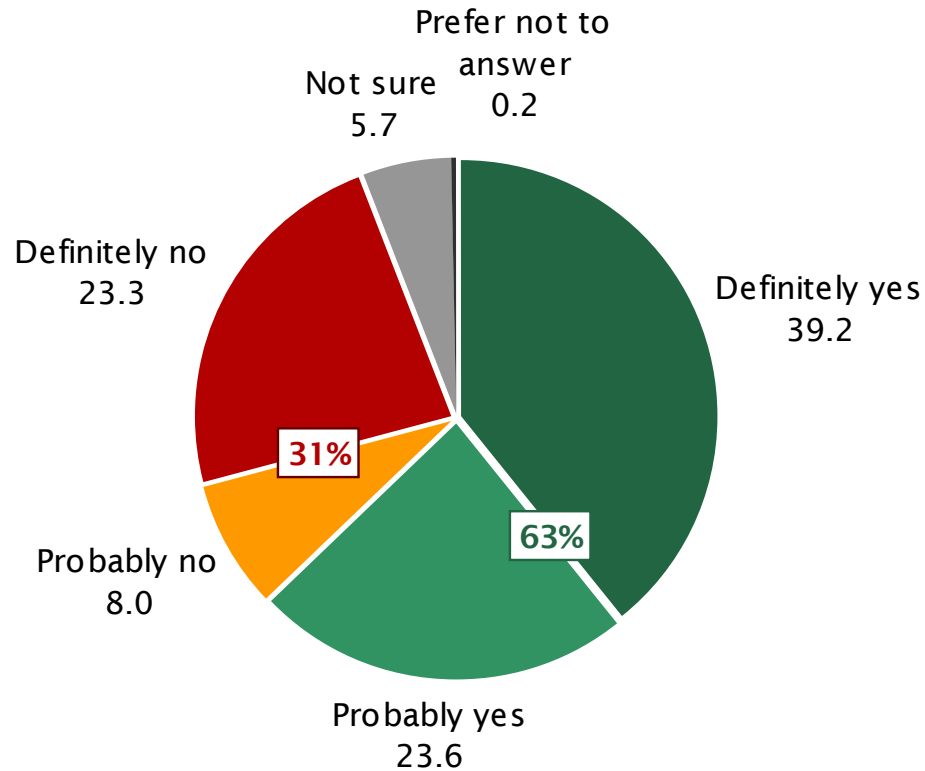
LIGHT PRESSURE



TAX THRESHOLD



SUPPORT AVERAGE OF \$132 PER YEAR





CONCLUSIONS & RECOMMENDATIONS

- OUSD voters' support for a school bond fluctuates substantially depending on the election scenario
 - Light competition/opposition: support is comfortably above the 55% threshold (~64%)
 - Heavy competition/opposition: support is on the bubble (54%/55%)
- Better to plan/prepare for the heavy pressure scenario than hope for light pressure



CONCLUSIONS & RECOMMENDATIONS

- The latest survey results do not provide a compelling argument for choosing the SFID route over a districtwide approach
 - In a side-by-side test, support for districtwide bond was slightly better when compared to the two SFID bonds in a light pressure scenario
 - Orange & El Modena voters aren't as receptive to an SFID bond, so its not the 'safe bet' option we thought it might be
- External factors are also important to consider
 - Easier to communicate/coordinate regarding a single bond
 - No need to split campaign committees, fundraising, messaging
 - If have two SFID's on the ballot, could lead to some confusion



CONCLUSIONS & RECOMMENDATIONS

- Voter support for the bond depends on the tax rate *and* the election scenario
 - Light pressure: 54% @ \$34 per \$100K
 - Heavy pressure: 47% @ \$34 per \$100K
- Support increases substantially when voters are informed of annual total cost of the measure for the typical home owner
- Reality is that the tax rate will be less a factor in the outcome of the election than the effectiveness of outreach/communications/campaign and the amount of teamwork/unity exhibited in support of the bond.

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INITIAL BALLOT TEST (DISTRICT-WIDE)

In order to:

- Repair and modernize aging high school classrooms, labs and school facilities including deteriorated roofs, plumbing, and electrical systems
- Complete earthquake safety retrofits
- Improve campus safety and security
- And upgrade career-training facilities, science labs, libraries, and technology that support student achievement in math, science, engineering and skilled trades

Shall the Orange Unified School District issue 340 million dollars in bonds at legal interest rates, with independent citizen oversight, no money for administrators' salaries, and all money locally-controlled? If the election were held today, would you vote yes or no on this measure?



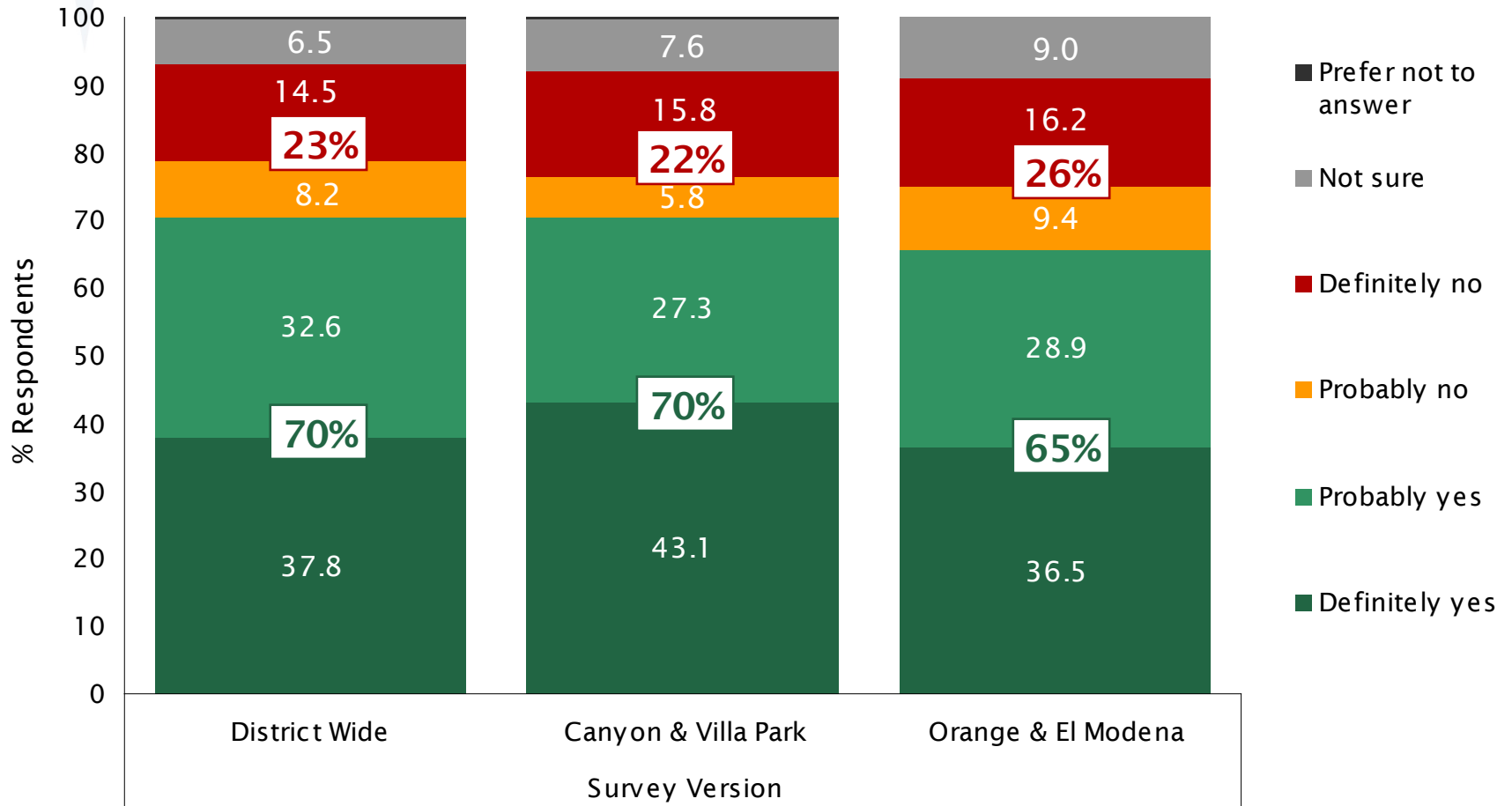
INITIAL BALLOT TEST (SFID EXAMPLE)

In order to:

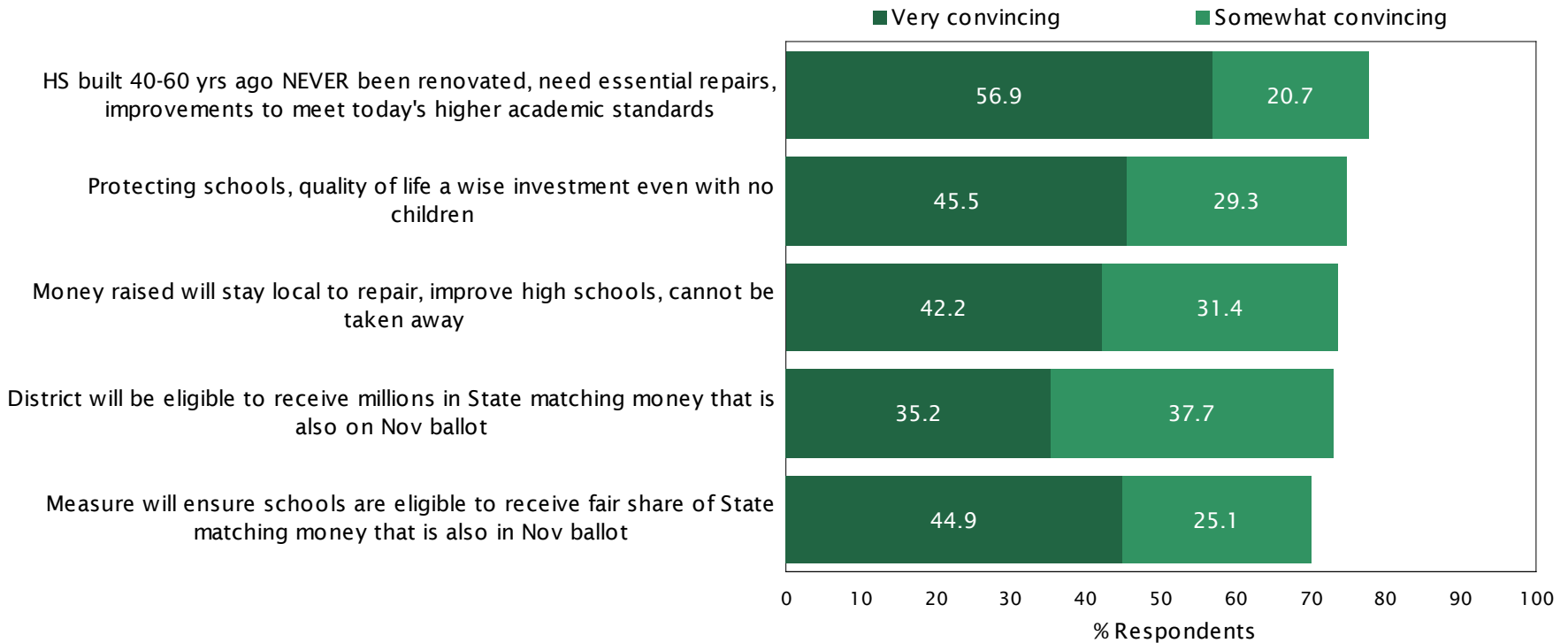
- Repair and modernize aging classrooms, labs and facilities at Canyon and Villa Park High Schools including deteriorated roofs, plumbing, and electrical systems
- Improve campus safety and security
- And upgrade career-training facilities, science labs, libraries, and technology that support student achievement in math, science, engineering and skilled trades

Shall School Facilities Improvement District Number 2 of the Orange Unified School District issue 170 million dollars in bonds at legal interest rates, with independent citizen oversight, no money for administrators' salaries, and all money locally-controlled? If the election were held today, would you vote yes or no on this measure?

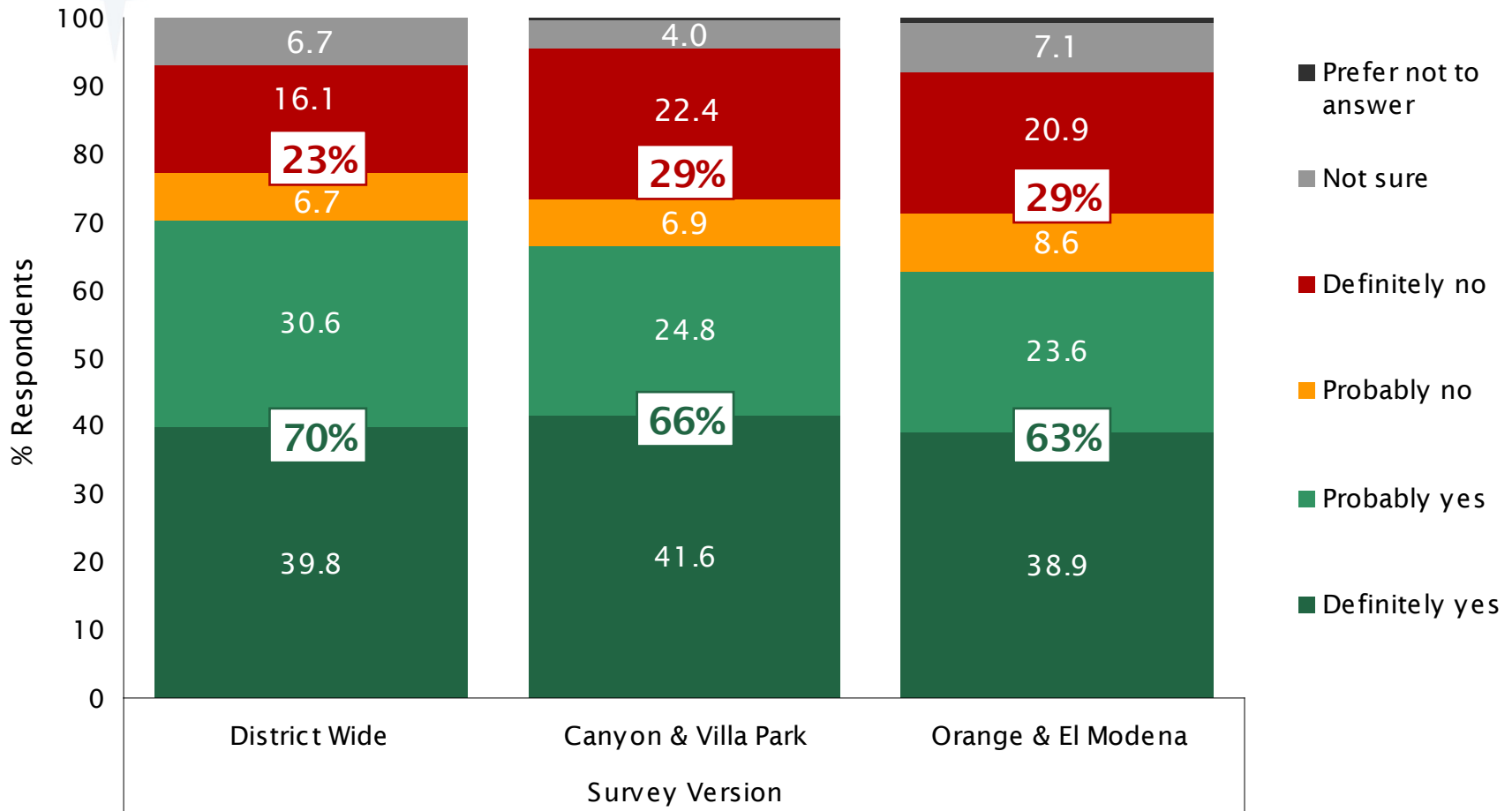
INITIAL BALLOT TEST



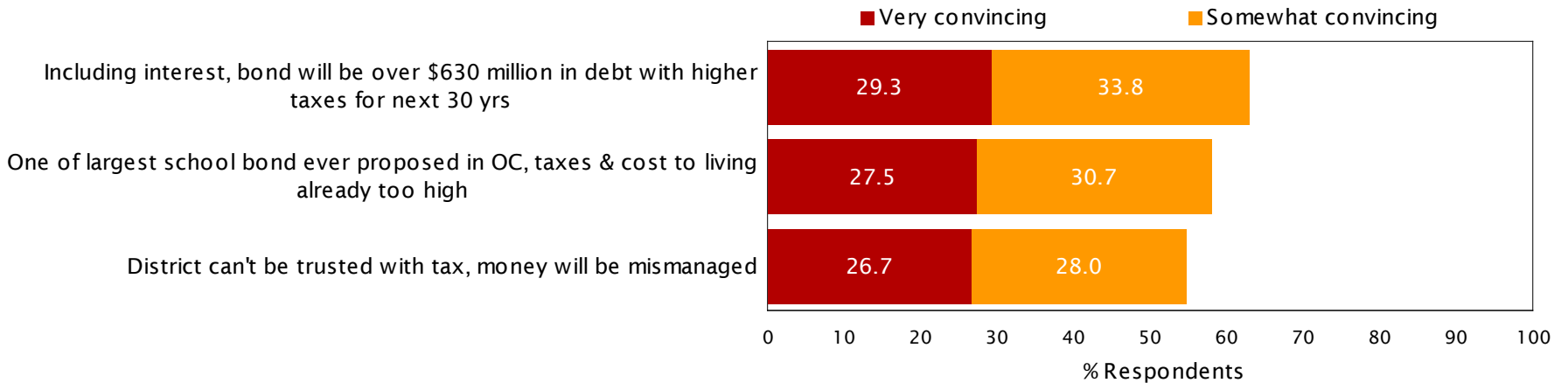
POSITIVE ARGUMENTS



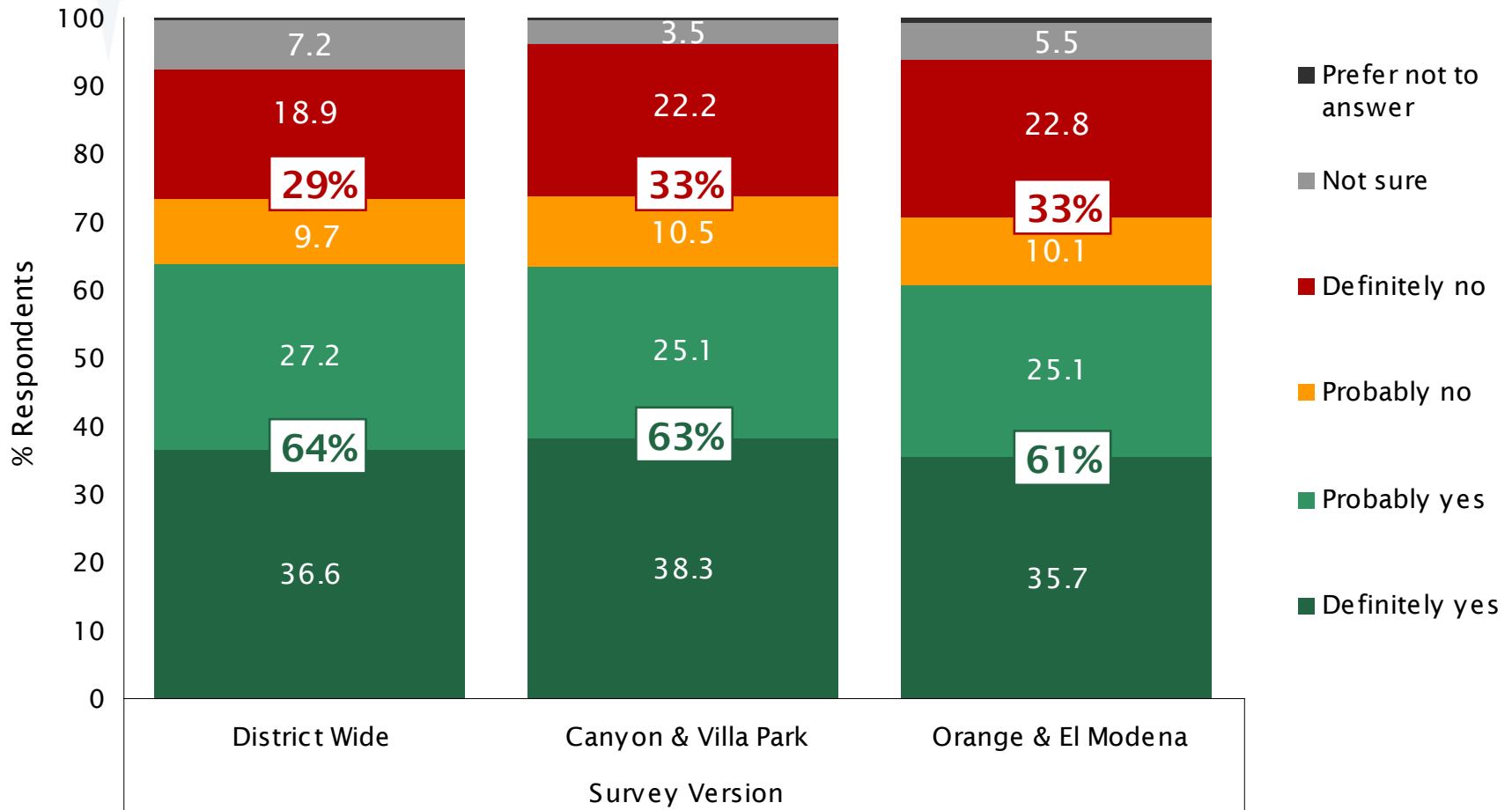
INTERIM BALLOT TEST



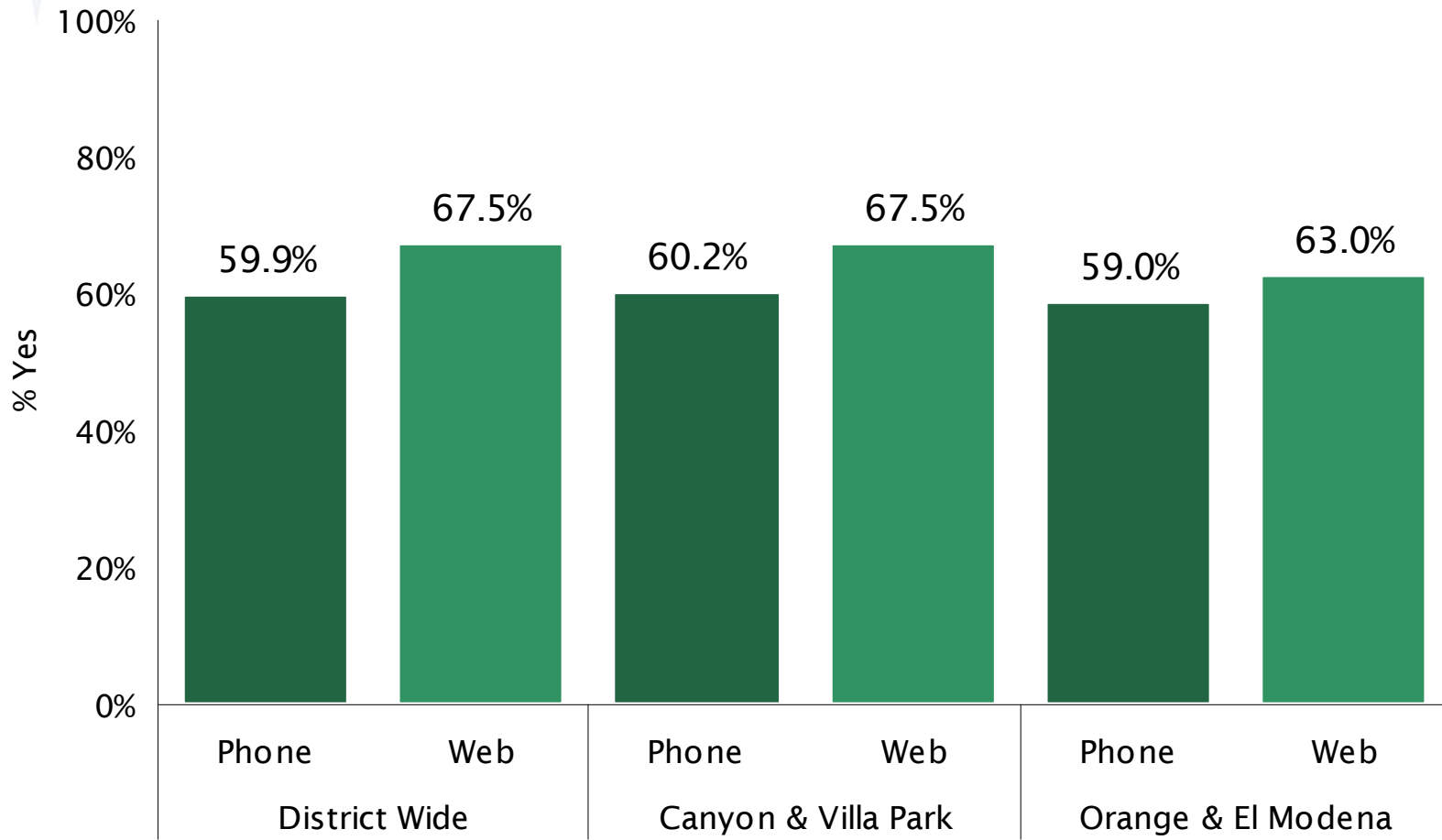
NEGATIVE ARGUMENTS



FINAL BALLOT TEST

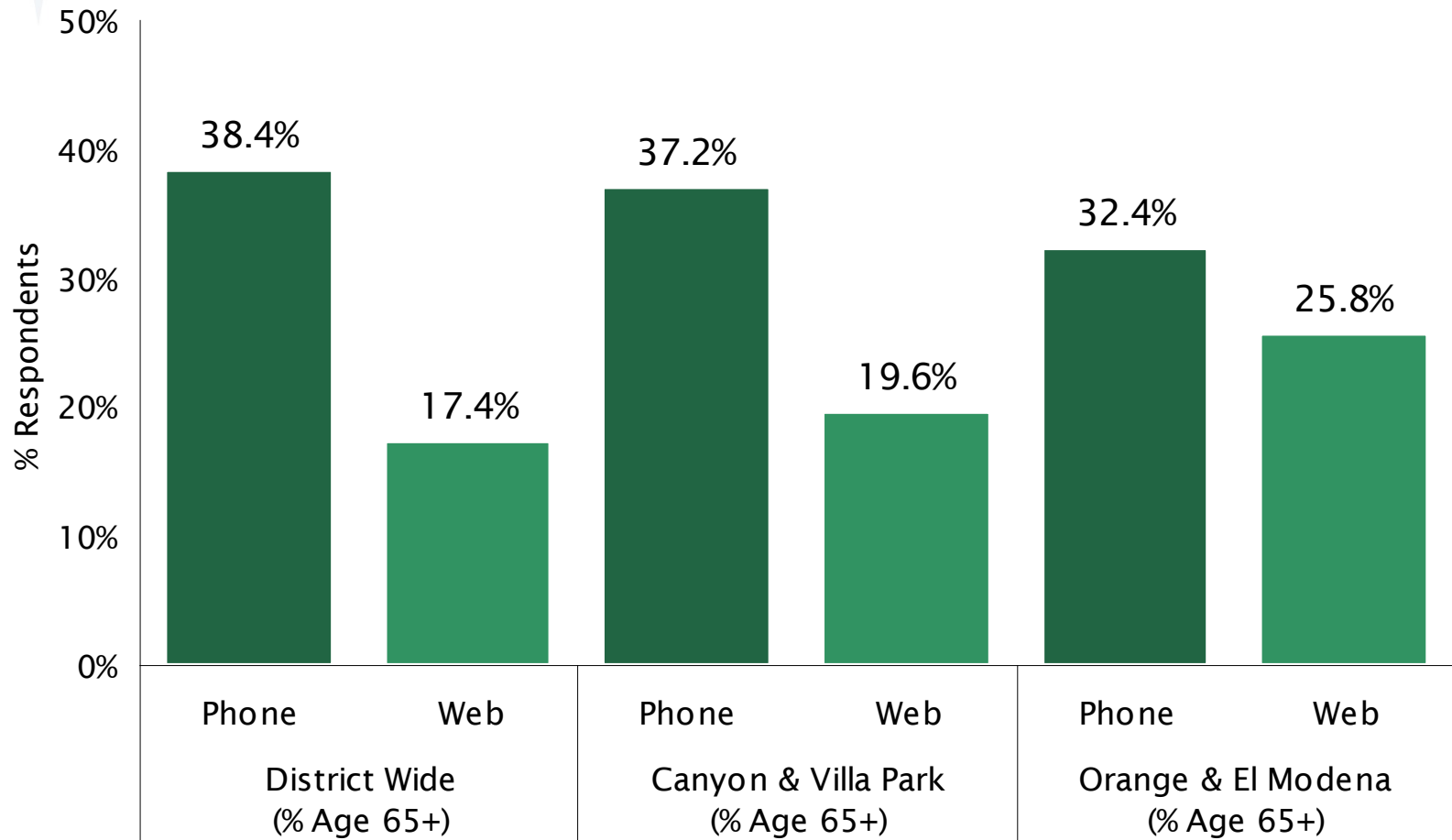


PHONE VS. WEB SURVEY SUPPORT AT FINAL BALLOT TEST



PHONE VS. WEB SURVEY

% OF VOTERS AGE 65+



PROP 51, \$9 BIL STATEWIDE EDUCATION BOND FOR K-12 & COMMUNITY COLLEGES

