

CliffordMoss.

January 15, 2016

Dr. Tony Knight
Superintendent – Oak Park Unified Schools

Martin Klauss
Assistant Superintendent - Business

Sent via email to: tknight@opusd.org; mklauss@opusd.org

Re: Proposal for Revenue Measure Renewal Feasibility and Public Engagement Services

Dear Dr. Knight:

Thanks for taking the time to meet with Tim Carty and I earlier this week to discuss Oak Park USD's desire to engage in feasibility, public communication and ballot preparation work to prepare for a GO bond in November, 2016. I enjoyed our conversation and look forward to the opportunity to work with you, Martin and the team.

As we discussed, I strongly believe the District should consider starting this project with a voter survey to assess feasibility. Once we've polled and completed our political diagnostics, we can form an operating plan for the bond and begin a process of engaging the Oak Park public in our vision and planning. People support what they help create and in a community like Oak Park, it will be critical to engage and solicit feedback from the community as we build your bond package. We will also need to prepare high quality ballot materials as your board draws close to calling an election. Our firm can help with all of these efforts and we are eager to begin.

The following is a brief proposal for services. Please do not hesitate to contact me with additional questions or concerns after you've had a chance to review this document.

Your Story

As you know, Oak Park Unified is a high achieving district in Southern Ventura County. While the District's accolades are high, so too are the number of students who attend Oak Park schools from outside the school district boundaries. Local voters have supported bonds and parcel taxes in Oak Park for some time – but careful planning is required as the District has faced opposition in past losses and should expect some skepticism this time around.

You have catalogued roughly 76 million in priority work in your "needs assessment" and, based on calculations from your financial advisor, you are envisioning a GO bond of about

60-65 million at the top (60/100,000) of the legal limit.

Your success with previous ballot measures indicates this effort has potential. At the same time, you have some real risk factors that must be managed in the coming months. In general, our view is that any big vision requires the input of the community. The community needs to be consulted and have their voice heard before they will resolutely support a measure. **Per our discussion our first phase of work will focus on determining how, when, and whether to proceed with a bond plan.**

About Us

At Clifford Moss we have over 30 years of combined experience working with a wide array of clients, including many School Districts like Oak Park.

We are not the typical political strategy corporation. We are a boutique firm that brings a spirit of innovation to our work to continuously challenge the conventional wisdom with which other public affairs and political strategy firms often practice. Our projects are led by our principals – who you see is who you get.

We design a unique program for each of our projects. If we work together, you should expect us to employ the best time-tested strategies and tactics while also bringing a new, creative edge – we will enhance proven techniques with cutting edge technology, innovative approaches to new media and robust online campaigns.

Project Overview

Our overall goal is to help guide you through making the right decision for Oak Park Unified. We propose starting with a robust feasibility process including opinion research on a new bond. A well-done poll will allow us to use data to make the decision together to (a) move ahead immediately to renew in November 2016 (b) move ahead with caution, or (c) hold.

If we decide together (based on the data and what we heard) to move ahead with a bond, then a broader public engagement plan will be developed in collaboration and implemented accordingly.

Step 1 – We listen to you

Many firms will come in and tell you exactly what you should do, without really understanding what your needs are. We don't do that. We believe that "fit" matters – we have already begun initial conversations with you, and will continue to sit with your team to understand your situation and specific needs.

Step 2 – Feasibility

We work closely with a qualified pollster to draft and conduct a poll. In this case we suggest True North Research. They've worked recently in nearby communities (LVUSD in 2015) and they are well qualified for the task ahead.

The survey will be designed to provide an unbiased, *statistically reliable* assessment of whether it is feasible to pass a bond measure and – if yes – determine how best to package a measure for success. Voters who are likely to cast a ballot in the November 2016 election will be selected for the study using a stratified and clustered random sampling methodology, which will produce statistically reliable results with an estimated margin of error of due to sampling of +/- 6.8% at the 95% level of confidence (based on sample of 200). To maximize the response rate and reduce response bias, True North will employ a mixed-mode design that utilizes multiple recruiting methods (telephone and email) and provides respondents the flexibility to complete the survey by telephone or online at a secure, password protected website. True North will lead all tasks associated with the survey – including design, implementation, analysis and reporting -- in close coordination with CliffordMoss and the District.

Once polling is complete, we will work with you to prepare a comprehensive presentation for you first, then your board, and any key opinion leaders. The results of this phase will play a role in whether or not we recommend moving forward with step 3.

Step 3 – Public Engagement

If it is determined in the feasibility phase, that moving forward with a bond in 2016 makes sense then Public engagement will play a vital roll. A public engagement strategy plan will be implemented that includes broader stakeholder and opinion leader work, and communication with the Oak Park community.

Standard Public Engagement Strategies:

- **Superintendent's Advisory Committee** - effective establishment, management, and navigation
- **Opinion Leader Engagement** – strategic conversations initiative
- **Stakeholder meetings strategy**
- **Newsletter** updates highlighting critical work and District successes.
- **E-Marketing** (content for web, email, social media)
- **Direct Mail** – still the most effective way to reach local **voters**
- **Resource Development & Communications** planning for the Future
- **Ongoing analysis and monitoring**, revisiting the plan if needed. This process is organic; we must have a plan, but be nimble enough to re-direct if the community and environment calls for it.
- Ensure message alignment across all platforms - **Key!**
- Solicit opinions & input from the Measure H Bond Oversight Committee, your Board and key internal stakeholders.

References

We recognize that you have a decision in front of you when choosing a public information and strategy firm. The following are a few references:

Bobbie Plough – Former SCUSD Superintendent
(951) 990-2552, bplough@cox.net

Dan Stepenosky - Las Virgenes Unified Superintendent
818-880-4000, superintendent@lvusd.org

Lisa Cesario – Las Lomas Elementary School District Superintendent
(650) 867-9662, lcesario@llesd.org

Proposed Fee

We work on a flat monthly retainer basis of \$6,000 per month beginning immediately (partial months will be prorated). We also propose that you select True North as your pollster and their polling quote is a flat fee of \$22,750 for a 15 minute poll with N=200.

As always, our fee includes access to our team for strategic advice, honest assessment of the feasibility phase next steps, our development of a communications research and public outreach plan and our assistance in implementing critical plan elements including mail design, electronic outreach and strategic messaging. Program costs (mail, website, design etc.) are extra and will be the result of a budget we build in collaboration with your team.

We look forward to working with you. If you have comments about our proposal, let us know. Contact us at tom@cliffordmoss.com or 510.847.7155 with any questions.

Best,

A handwritten signature in black ink, appearing to read 'Tom Clifford', with a stylized flourish at the end.

Tom Clifford