TO: Tom Burke  
Chief Financial Officer, Kern Community College District

FROM: John Fairbank, Rick Sklarz & David Sokolove  
Fairbank, Maslin, Maullin, Metz & Associates

RE: Proposal to Conduct Public Opinion Research for Kern Community College District

DATE: July 16, 2015

Fairbank, Maslin, Maullin, Metz & Associates (FM3) is pleased to submit this proposal to conduct survey research to determine the viability of a possible Kern Community College District ('the District') bond measure in the November 2016 statewide election. Our firm is the statewide leader in helping California’s Community College Districts secure voter approval for bond-funded facilities improvements, and our research has aided the passage of $17.68 billion total in facilities bond funding for 29 local California community college districts – more than any other California-based research firm.

As you know, FM3 provided research which assisted the District in passing its most recent bond measure, the $180 million Measure G in November 2002. As we did in 2002, FM3 proposes to utilize a methodology for this research that will enable the District to explore and compare relative levels of voter support for both the Districtwide and campus-specific bond measures that are currently being considered by District leadership. This will enable the survey results to effectively inform the District’s decision-making about what type of measure or measures are most prudent to pursue.

The balance of the proposal outlines FM3’s relevant experience, survey research methodology, proposed project timeline and budget.
RELEVANT EXPERIENCE

✓ **FM3 has a track record of providing voter opinion research to the Kern Community College District (KCCD) that has helped the District succeed in past elections.** FM3 was the lead public opinion research firm retained by KCCD in the development of the District’s successful $180 million Proposition 39 bond **Measure G** in 2002. FM3 conducted a comprehensive baseline survey for KCCD in June 2002, prior to the District placing Measure G on the ballot, which among other issues tested voters’ prioritization of potential projects that could be funded with bond proceeds. Identifying the particular improvements that were most important to voters informed KCCD’s thinking as the bond measure and its ballot language were being drafted.

FM3’s baseline survey also tested various framings, and informational and educational messages to help inform voters of the District’s need for additional facilities funding, and the data from this aspect of the survey helped the District develop an effective public outreach program to raise community awareness. **Measure G** was ultimately approved by voters on November 5, 2002 with more than 59 percent support, well within the +/- 4.0 percent margin of sampling error of FM3’s June 2002 baseline survey.

**Figure 1** below illustrates the level of voter support for **Measure G** in both FM3’s June 2002 baseline survey and in the final election results from November 2002.

![Figure 1: Measure G Voter Support: Baseline Survey vs. Election Results](image)

<table>
<thead>
<tr>
<th>Actual Election Results (November 2002)</th>
<th>59.2%</th>
</tr>
</thead>
<tbody>
<tr>
<td>FM3 Survey Result (June 2002)</td>
<td>61%</td>
</tr>
</tbody>
</table>

✓ **FM3 is an industry leader in helping California community college districts successfully pass local finance measures, including numerous districts in the Central Valley.** We have a **winning track record of over 95 percent with community college finance measures**, and our research has helped secure voter approval for more than $17.68 billion in general obligation bond funding for California’s local community college districts – including more than $1.7 billion for six districts representing every region of the state in the most recent November 2014 election alone.

We have helped pass bond measures in community college districts from the Mexican border (Southwestern CCD) to the Sierra (Butte-Glenn CCD), and from the Central Coast (Hartnell CCD) to the agricultural hub of the Central Valley (State Center CCD).
recent years, FM3 has worked with community college districts to assist them in passing bond measures to upgrade their campuses, acquire technology needed for educational purposes, and increase capacity to accommodate enrollment. Through our research, FM3 has been able to successfully identify the themes and issues voters find most compelling to effectively frame a finance measure.

**FM3 is also deeply experienced in assisting local community college districts that are seeking their second, or even third bond measure within a short period of years.** In addition to our work with the aforementioned Los Angeles CCD (three consecutive bond measures in 2001, 2003 and 2008 totaling $5.68 billion), Coast CCD (two bonds in 2002 and 2012 totaling $1.068 billion), Ohlone CCD (two bonds in 2002 and 2010 totaling $499 million), and Southwestern CCD (two bonds in 2000 and 2008 totaling $478.3 million), FM3’s research aided Sonoma County CCD in the passage of bond measures in 2002 ($251 million) and 2014 ($410 million) and Compton CCD in 2002 ($100 million) and 2014 ($100 million). Our research helps school administrators and elected officials identify voters’ preferences and the educational messages that communicate the urgency and need for a new community college bond measure, even as previously-approved bond funds are being repaid.

Additional California community college districts that have utilized FM3’s research services to help secure voter approval for bond measures include:

**Central Valley:**

- **Lake Tahoe Community College District**, 2014 ($55 million)
- **Yosemite Community College District**, 2004 ($326 million)
- **San Joaquin Delta Community College District**, 2004 ($300 million)
- **Kern Community College District**, 2002 ($180 million)
- **State Center Community College District**, 2002 ($161 million)
- **Gavilan Joint Community College District**, 2004 ($108 million)
- **Butte-Glenn Community College District**, 2002 ($84.9 million)
- **College of the Sequoias Community College District**, 2006 ($22 million)

**Other Areas:**

- **Compton Community College District**, 2014 ($100 million)
- **Mt. San Jacinto Community College District**, 2014 ($55 million)
- **North Orange County Community College District**, 2014 ($574 million)
- **San Luis Obispo Community College District**, 2014 ($275 million)
- **Coast Community College District**, 2012 ($698 million)
- **Sonoma County Jr. College District**, 2014 ($410 million)
- **Solano Community College District**, 2012 ($348 million)
- **Ohlone Community College District**, 2010 ($349 million)
- **Los Angeles Community College District**, 2008 ($3.5 billion)
- **San Diego Community College District**, 2006 ($1.555 billion)
FM3’s extensive experience working to fund educational facilities at the statewide level has given us a wealth of knowledge about voters’ perceptions of community colleges that will help the District best position a bond measure for success even in this challenging economic environment. In addition to our work with community college districts, our statewide research (focus groups and surveys) keeps us up to date on the California education policy environment as a whole. Our statewide research includes work on behalf of a coalition of organizations, including the California League of Community Colleges and the Faculty Association of California Community Colleges. FM3 also served as key strategists to Proposition 39, which enabled local school bond measures to be passed with a 55 percent vote. As a result of this historic ballot initiative, community colleges and school districts have successfully secured billions of dollars to improve and upgrade classrooms, school buildings and facilities that they would otherwise have been unable to obtain. Proposition 39 is one of FM3’s most significant achievements, and a particular source of pride for our company.

Most recently, in February of 2014, FM3 conducted a statewide survey for the Coalition for Adequate School Housing (C.A.S.H.) in partnership with the California Builders Association to assess voter support for a potential November 2014 statewide K-12 and community college education bond measure. Our findings from this recent research will provide us crucial context in developing the most appropriate possible research plan for the District. One key finding from this study was that, even after the passage of Proposition 30 in 2012, most voters see community colleges as having significant need for additional funding: 71 percent of California voters say that the state’s community colleges have either a “great” or “some” need for additional funding, with 38 percent saying colleges have a “great” need. Further, the study revealed that during the recession, voters’ already high regard for their local community college had actually increased. Voters value these institutions for providing access to affordable alternatives to four-year colleges, job training opportunities for veterans returning to the community and looking to build successful careers, creating local jobs, and a host of other unique benefits considered important and valuable to local economies. The study also showed that voters do see repairing and updating classrooms and science laboratories as a valuable project meriting scarce tax dollars.

FM3’s background of statewide education research will provide us crucial context in developing the most appropriate possible research plan for the District. Since the start of the Great Recession in 2008, FM3 research has identified a variety of message themes about community college facility improvements as effective ways to tap into voters’ already high regard for local community colleges and illustrate the value of passing a local community college bond measure even during an economic crisis. These crucial
themes include increasing local property values; reducing costs by incorporating energy-efficient technology; and making local colleges eligible for existing state matching funds that would otherwise go to other community college districts. FM3 can apply findings from our statewide education research to help KCCD develop messages and themes to ensure its measure appeals to voters.

**Survey Research Methodology**

**Project Approach:** FM3 understands that the District is currently considering placing a general obligation Proposition 39 bond measure with funding for improvements to all three of the District’s colleges – Bakersfield College, Porterville College, and Cerro Coso College – before the districtwide electorate.

FM3’s research over the years, particularly in recent election cycles, has highlighted the willingness of Latino voters to invest in their local community colleges. Further, voters in the City of Bakersfield are more likely than other demographics to identify personally with Bakersfield College and to have taken classes there (or have a family member who has done so), and/or to have another personal connection with the College that would make them more receptive to investing in its future.

In order to provide District leaders with a comprehensive understanding of voter support for a bond measure, FM3 proposes to conduct a telephone survey (via landlines and cell phones) with a base sample of 395 KCCD registered voters likely to cast a ballot in the November 2016 election. As approximately 79 percent of all KCCD registered voters who are likely to vote in November 2016 live within the Bakersfield College service area, this survey methodology would result in approximately 395 interviews among Bakersfield voters and 105 interviews with voters in the balance of the District. These sample sizes would result in a +/-4.4 percent margin of error districtwide.

In addition to this base sample of 395 likely November 2016 voters districtwide, FM3 recommends oversampling 55 voters in the Porterville College Service Area (contiguous with the Tulare County portion of the District) and 40 voters in the Cerro Coso College Service Area (consisting of Inyo and Mono Counties). This oversampling methodology will increase the total number of interviews conducted among voters in the Porterville College and Cerro Coso College Service Areas to 100 each, a sufficient number for FM3 to conduct a detailed analysis of the views of voters in these areas, and how their perceptions may differ from those of voters in other areas of the District. This oversampling methodology is illustrated in **Table 1** on the following page.
Table 1:
Number of Interviews & Oversample by KCCD College Service Area

<table>
<thead>
<tr>
<th>College Service Area</th>
<th>Percent of KCCD Nov 2016 Electorate</th>
<th>Number of Interviews: Base Sample</th>
<th>Oversample</th>
<th>Total Number of Interviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bakersfield College</td>
<td>79%</td>
<td>395</td>
<td>+5</td>
<td>400</td>
</tr>
<tr>
<td>Porterville College</td>
<td>9%</td>
<td>45</td>
<td>+55</td>
<td>100</td>
</tr>
<tr>
<td>Cerro Coso College</td>
<td>12%</td>
<td>60</td>
<td>+40</td>
<td>100</td>
</tr>
<tr>
<td>Districtwide</td>
<td>100%</td>
<td>500</td>
<td>+100</td>
<td>600</td>
</tr>
</tbody>
</table>

One of the key advantages provided by oversampling respondents in the Porterville and Cerro Coso College Service Areas will be the ability to test voters’ reactions to geographic- and College-specific messages, messengers/endorsers, and statements describing the specific capital and facilities needs of each specific campus. In our experience, one of the most effective ways for large, geographically-diverse agencies to gain voter approval for finance measures is to localize the benefits for voters. The oversampling methodology described above will enable FM3 to test localized messages, benefits, and potential bond endorsers among each of the District’s College Service Areas.

This telephone survey would take the average respondent approximately 20 to 22 minutes to complete. While a shorter survey could be conducted, it would not provide the ability to thoroughly test the range of ideas that we believe are necessary to adequately inform the District’s decision-making process regarding what kind type of bond measure to pursue. In addition to exploring the potential bond measure, the survey will allow for the assessment of the optimal bond amount and structure; prioritization of various projects the measure could fund; and evaluation of messages that might be part of public education the District may choose to undertake.

**Questionnaire Design:** In designing the survey research, FM3 will draw on its knowledge of public opinion survey methodology and its past experience conducting research for KCCD as well as other California community college districts, and from passing similar bond measures, including KCCD’s Measure G. FM3 will also be guided by the input it receives from the District in designing the questionnaire. The process will begin with an initial, in-person kickoff meeting between FM3 and KCCD staff that will be involved in the project. The meeting will provide a comprehensive discussion about major issues regarding infrastructure funding, Bakersfield College’s programs and services (as well as those of the Delano Center, the Weill Institute, Porterville and Cerro Coso Colleges) and budget challenges that should be explored in the survey.

FM3 will then present a first draft of the questionnaire to the District for review and comment. After collecting feedback on the first draft, we will revise and refine the survey.
We foresee proceeding through several drafts, incorporating feedback from the District before each revision, to develop a research instrument that is capable of obtaining all of the information desired by the District. Before commencing interviewing, FM3 will obtain approval from the appropriate District representative on the final version of the questionnaire.

While the final content of the questionnaire will be developed in careful collaboration with District staff, we imagine that the survey will likely include questions covering the following issues:

✓ What institution, if any, do voters regard as their local community college?
✓ How aware are voters of the District, and what are their impressions of it?
✓ How aware are voters of the District, and what are their impressions of it? Is the school seen as a source of pride and an important resource for the community?
✓ What do voters see as the major problems facing the community and the District?
✓ Do voters view Bakersfield College's (or the Delano Center's/the Weill Institute's/Porterville College's/Cerro Coso College's) buildings as deteriorating, run down, or in need of repair?
✓ Do voters think that enrollment at the District's colleges has increased in recent years? Do they think that classrooms and facilities are overcrowded?
✓ How do current economic issues – loss of jobs, declining retirement savings, rising costs of living – impact voter willingness to support a ballot measure to fund local education?
✓ Are voters aware that the State has typically funded facilities improvements, but now requires that local districts provide matching funds, hence creating the need for generating a local source of facilities funding? Do voters perceive that the District has effectively managed the facilities funds it has received from the state?
✓ How aware, if at all, are voters of Measure G, the $180 million bond measure that the District passed in 2002?
✓ Do voters trust the District to spend public funds efficiently and as promised?
✓ Are voters satisfied that the money raised by Measure G has been spent effectively and on the projects promised to voters?
✓ How do voters districtwide respond to specific language for a potential bond measure providing funding for all of the District’s colleges?
✓ How do voters within the Porterville College/Cerro Coso College Service Areas respond to specific language for a potential bond measure providing funding for their local college?
✓ Given realistic options, how do voters prefer that funds raised by a KCCD bond be spent?
✓ Given the current drought, does highlighting potential water recycling or conservation projects increase support for a bond measure?
✓ How do voters respond to different potential bond amounts – and their impact on local property taxes?
✓ What themes and messages are most effective educating local voters about a bond measure? Are there specific themes or messages that resonate strongly among different geographic or demographic subgroups?
✓ What are the demographic and socioeconomic characteristics of a measure’s supporters, opponents, and those who are undecided?
✓ Who are the most credible messengers to provide information on a KCCD bond measure?
Sample Selection: FM3 recommends completing a total of 600 interviews (500 base sample and 100 oversample) of approximately 20 to 22 minutes in length to examine how voter attitudes and opinions vary by demographic characteristics. We recommend drawing a sample of voters likely to cast ballots in November 2016. The sample will include voters on both landline and wireless phones, to ensure accurate representation of all demographic groups within the District’s electorate. The recommended survey length of 20 to 22 minutes will provide adequate interview time to address the various issues regarding the types of bond measures the District is considering. The recommended total sample size of 600 will provide sufficient numbers of interviews with the various partisan and ethnic sub-groups of the District’s electorate for FM3 to produce a statistically-reliable analysis of the survey results for each of these sub-groups of the electorate.

Spanish Translation: As previously shown in Table 1, our analysis of the voter file database indicates that 26 percent of KCCD voters likely to cast a ballot in the November 2016 election are of Hispanic or Latino background. Given the District’s high concentration of Latino voters, we recommend translating and administering the survey in Spanish as well as English to ensure that language barriers do not prevent some voters from voicing their opinions. FM3 routinely offers surveys in multiple languages in addition to English, and has Spanish-speaking staff fully capable of overseeing Spanish translation and administration.

Survey Pre-Testing: Once approved for fielding, the questionnaire will be pre-tested with a sufficient number of respondents to assure ease of administration and flow. Such testing will also verify the length of the questionnaire and the survey questions’ clarity and comprehensibility. The results of the pre-test will be reviewed with District staff in order to determine if any adjustments need to be made before interviewing proceeds.

Interviewing: The KCCD survey research will be conducted by telephone with well-established procedures to supervise the interviewing process and to verify that interviews are conducted according to specifications. Among these procedures are the monitoring of actual interviews by on-site supervisors, identification of each interview by interviewer through telephone monitoring equipment, and the use of a regularly employed staff of professional, full time interviewers. There is an established protocol for callbacks of busy or "not-at-home" numbers designed specifically to maintain the randomness of interviewee selection. FM3 retains all interviews as part of its data processing procedures described below.

Data Analysis: Response data will be analyzed by FM3’s Data Processing and Analysis Department staff using Survey System software, a well-documented and widely used data analysis software package. As needed, FM3 may augment Survey System with its own custom-designed statistical analysis program to report the tabulation and cross-tabulation of data.

The day after interviewing has been completed, FM3 will provide the District with “topline” survey results. These results will present the overall percentage of respondents that chose each answer to each of the survey’s questions.
Within 24 to 48 hours from completion of the last interview, FM3 will provide the District with a comprehensive set of cross-tabulated results. The cross-tabulated results will include a table for each question or demographic variable in the survey, with a series of up to 200 columns indicating how various subgroups of the population responded to each question. The cross-tabulated results will make it possible to detect differences in responses to each survey question among subsets of the electorate: for example, it will be possible to compare men and women; voters under age 50 and age 50 and over; households with and without people under the age of 18; homeowners and renters; different income groups; long-time residents and more recent arrivals; and many more subgroups of the District’s population.

The Data Processing and Analysis Department staff employs a data checking and editing system to eliminate errors and document the handling of data received from the interviewers. FM3’s custom-designed data processing software package can convert data to ASCII format or virtually any other format commonly used.

**Reports and Presentations:** Results of the survey will be presented both in-person and in writing. After FM3’s report and presentation have been completed, FM3 will remain available to answer follow-up questions from District staff. FM3 views the responses to the survey as an ongoing data resource. If the need arises, FM3 can do further analysis to provide answers to follow-up questions that may be posed by the District.

**Deliverables:** In summary, upon conclusion of the survey project, the District will have received from FM3 all of the documents listed below. All documents can be provided in hard-copy and electronic formats.

- **Final survey questionnaire(s)**
- **Topline survey results** (the survey questionnaire with response percentages for each response code)
- **Cross-tabulated results** (responses to all survey questions segmented by demographic, geographic, attitudinal and behavioral subgroups of KCCD voters)
- **In-person PowerPoint presentation of key findings** (color slides highlighting important findings and conclusions)
- **Raw data from the survey in electronic form** (delivered in a file format chosen by the District – if requested)
**Sample Timeline**

FM3 is ready to begin work on opinion research on behalf of the District immediately, at the District’s request. One of our firm’s strengths is our ability to complete a course of research quickly and efficiently. A draft outline of the timeframe within which project milestones will be completed follows below.

**Week 1**
- Authorization to proceed; kick-off meeting
- Finalize sample specifications and survey methodology and processes
- District provides relevant information for FM3 to begin drafting of research
- Circulate first draft of survey for comment
- Revise initial bond measure survey draft based upon District staff review and comments
- Translate survey instrument into Spanish
- Finalize English and Spanish survey drafts for pre-testing
- Acquire the survey sample
- Conduct pre-test of survey instrument

**Week 2**
- Conduct survey interviews
- Produce topline results
- Debrief with District staff on the topline survey results
- Produce cross-tabulation report

**Week 3 & 4**
- Debrief with District staff on the survey cross-tabulation results
- Produce reporting materials, including a summary of the survey’s key findings and a graphic presentation of the results
- Present key findings to District staff and stakeholders as needed

We are capable of accelerating or adjusting this timeline to meet the District’s needs – either to complete the research more rapidly or to allow more time for any stage of the process – and would be happy to adjust the timetable at your request.
Table 3 presents the costs for the proposed survey research, including translation and bilingual interviewing. This cost estimate is all inclusive and includes final sample preparation, drafting of the survey questionnaire, data tabulation, cross-tabulation and other statistical analysis, and reporting the results. Direct incidental expenses such as extra reproduction of reports and travel are not included, but would be billed at cost, if incurred.

Table 3:
KCCD Bilingual Survey Cost, N=600

| 20-22 Minutes | $39,500 |

Of course, alternative survey structures are possible, which may result in higher or lower costs. FM3 is committed to working with you to tailor the research plan to fit your budget and meet your research needs. FM3 will be happy to bill the project in phases; we will charge half of the total amount for the initial development of the questionnaire, and bill the remainder once you have received complete survey results.

If you have any questions about our firm, or if you would like more information, please do not hesitate to contact us. We would welcome the opportunity to work with you to craft a successful campaign. Thank you for your consideration.

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