

# BOND FEASIBILITY STUDY

CONDUCTED FOR THE  
ORANGE UNIFIED SCHOOL  
DISTRICT

PRESENTED BY  
TIMOTHY McLARNEY PH.D.

1/22/2016





# PURPOSE OF STUDY

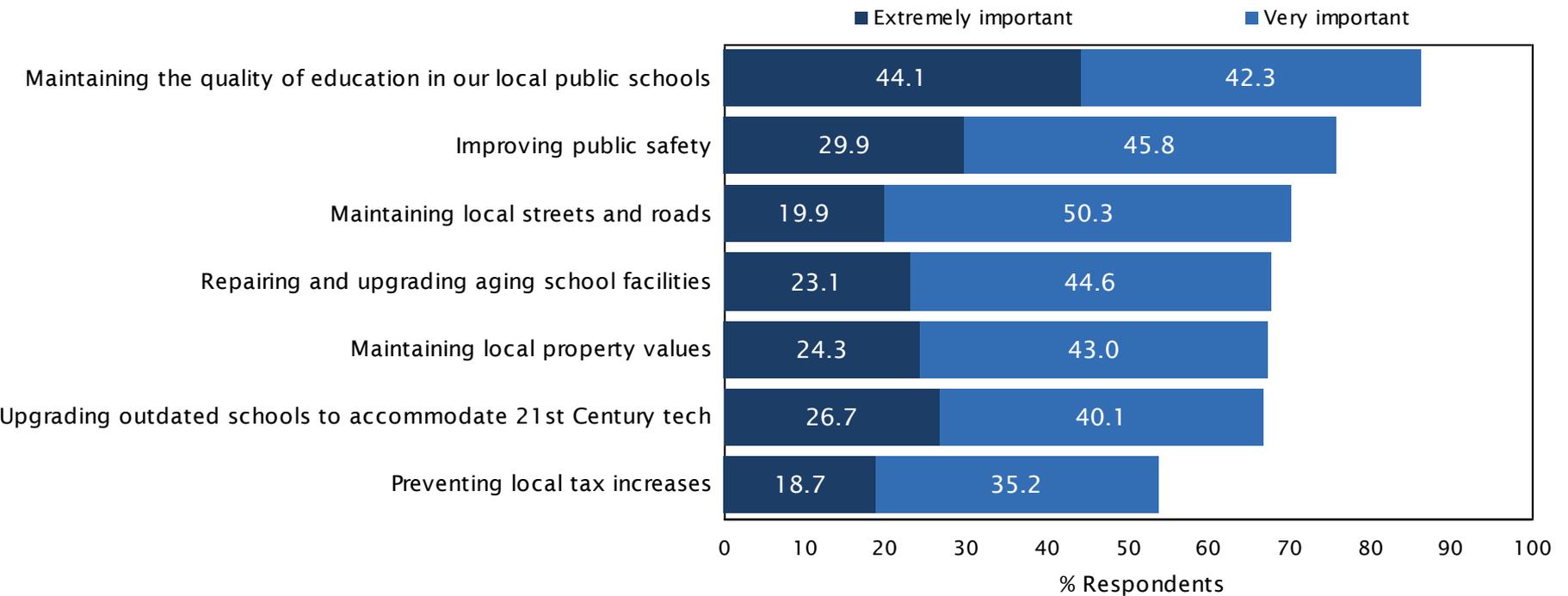
- Determine if a bond measure is feasible
- Identify how to create a measure consistent with community priorities
- Gather information needed for communications & outreach



# METHODOLOGY OF STUDY

- Telephone survey
  - Conducted December 1st to December 15th , 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  $\pm 6.9\%$

# IMPORTANCE OF ISSUES





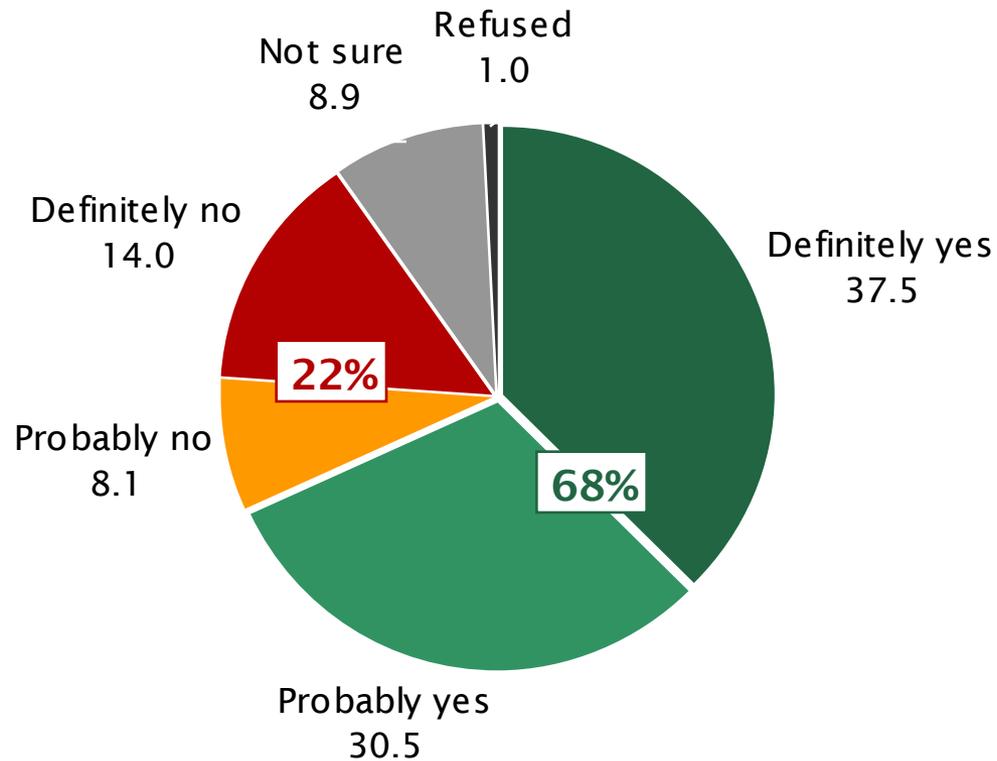
# INITIAL BALLOT TEST

In order to:

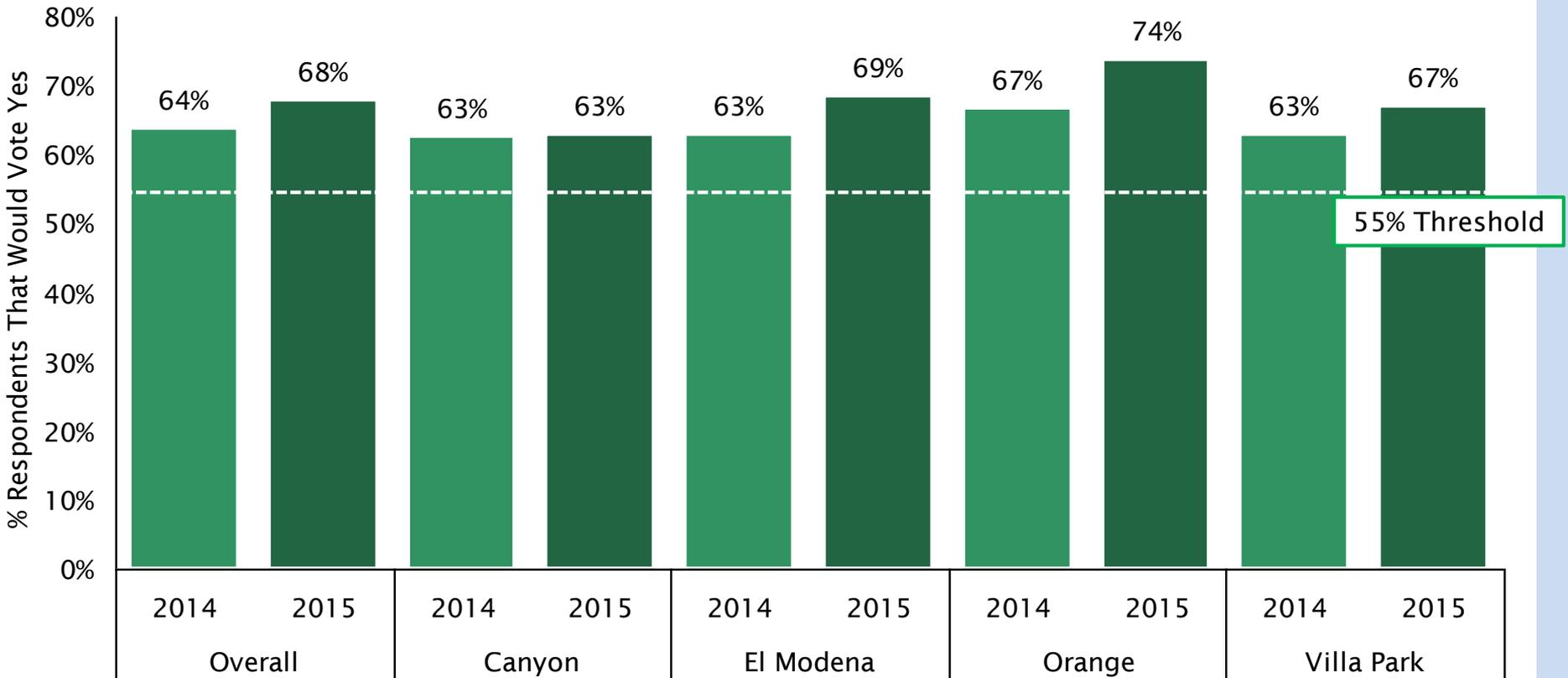
- Repair and modernize classrooms and school facilities, including repairing deteriorating roofs, plumbing and electrical systems
- Retrofit old buildings to meet earthquake safety standards
- Improve student safety and campus security systems
- And upgrade career-training facilities, classrooms, science labs, libraries, and instructional technology to 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 and all money staying local? If the election were held today, would you vote yes or no on this measure?

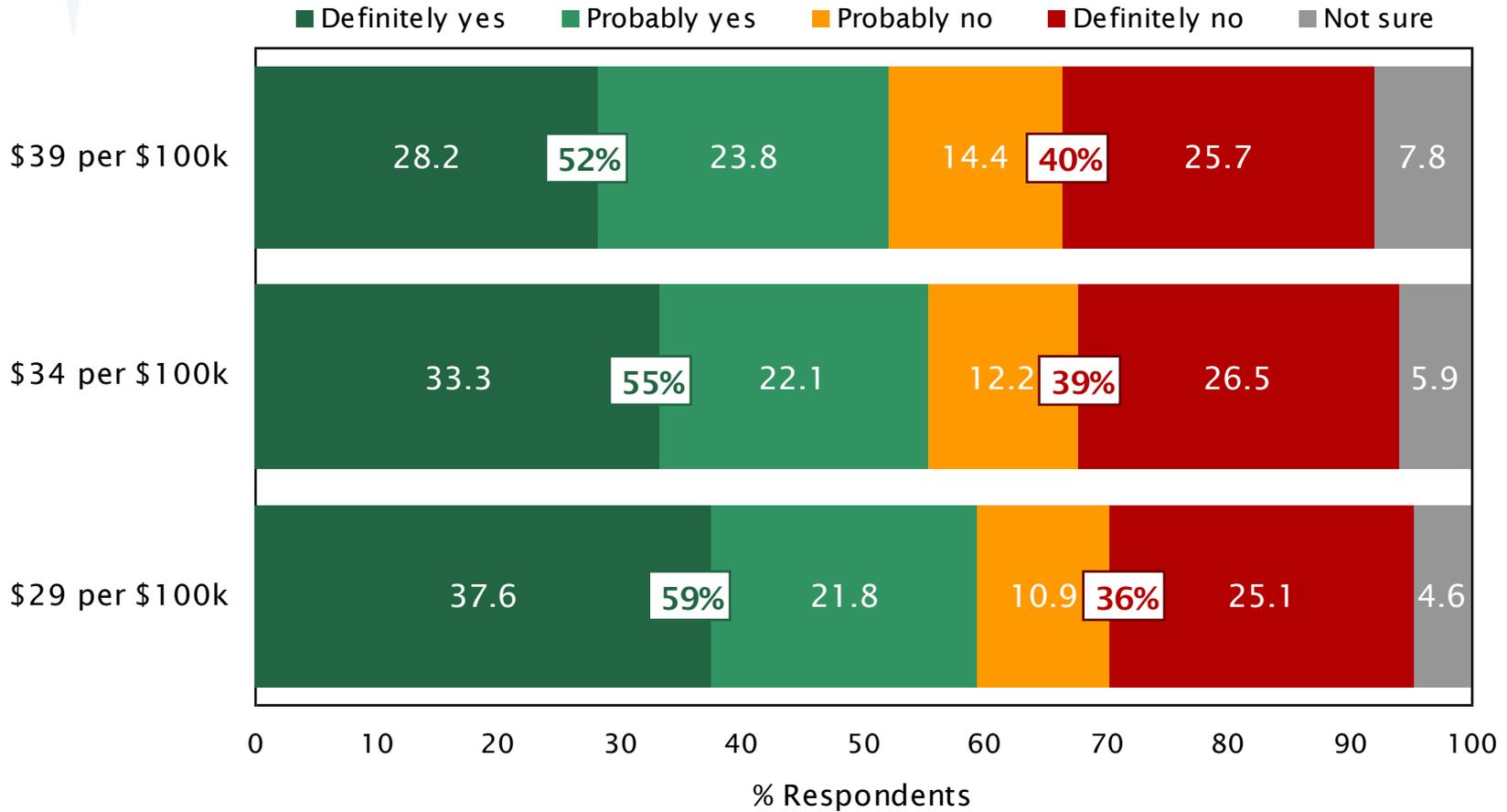
# INITIAL BALLOT TEST



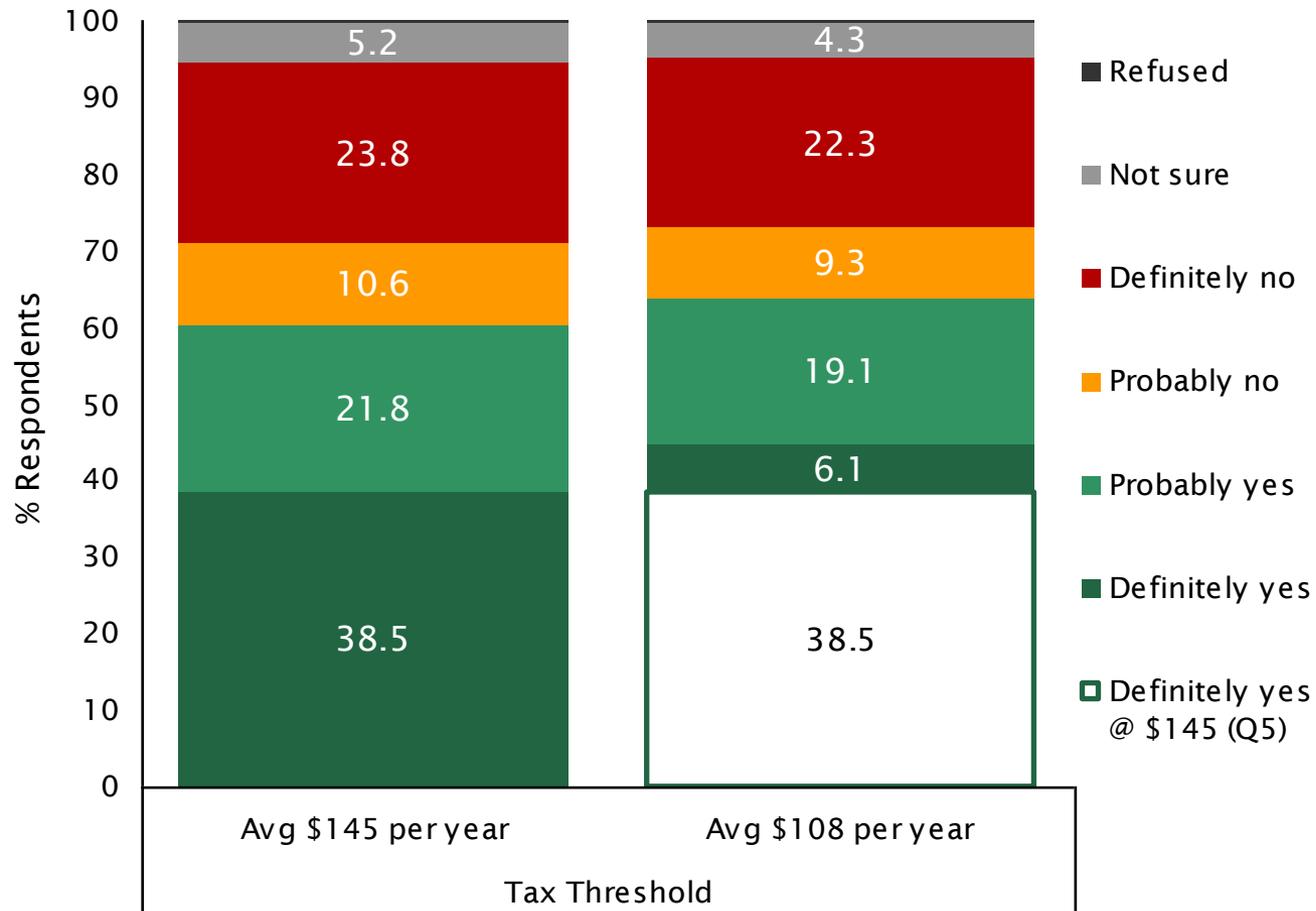
# INITIAL BALLOT TEST BY ATTENDANCE AREA, 2014 & 2015



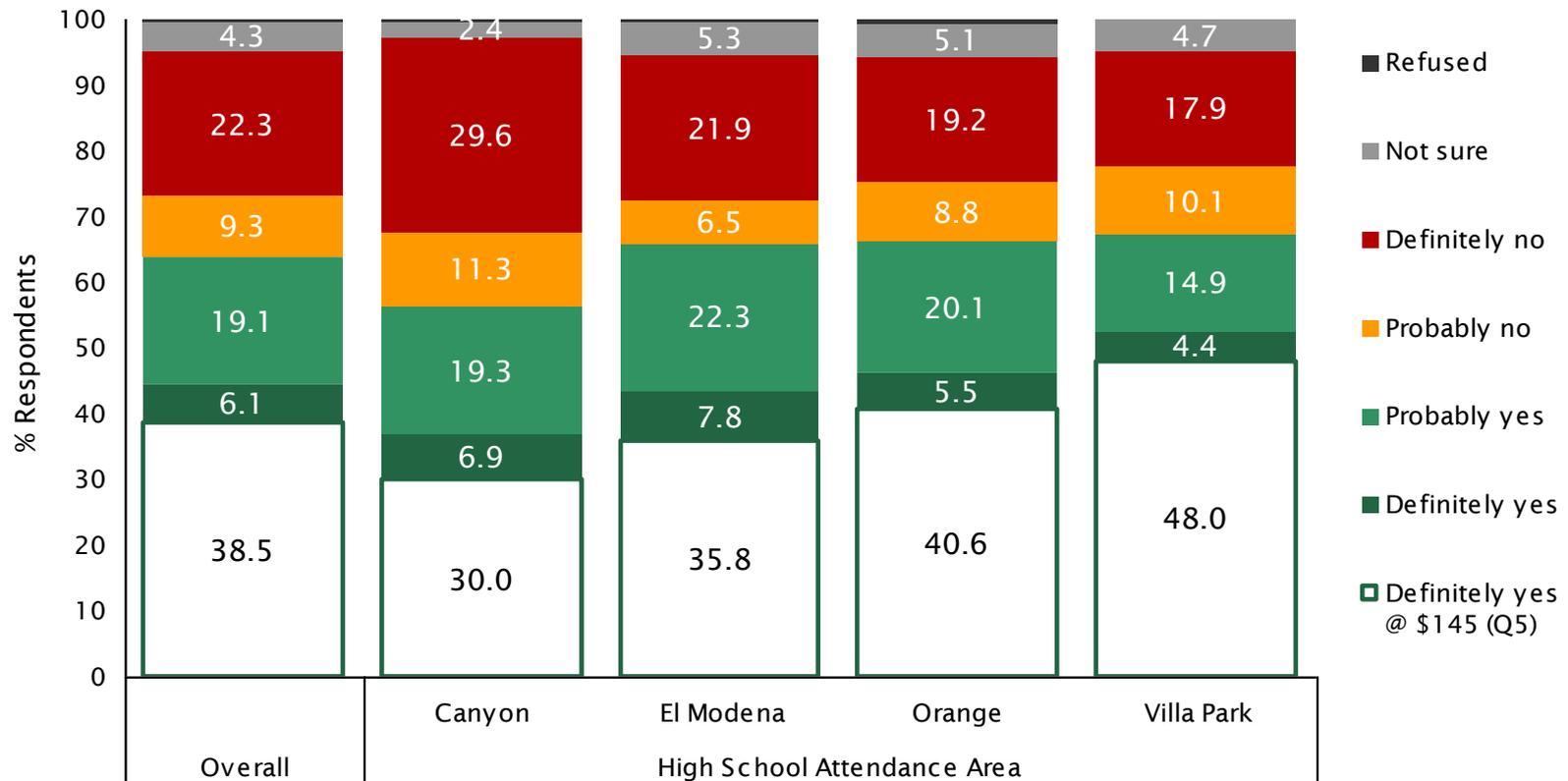
# TAX THRESHOLD



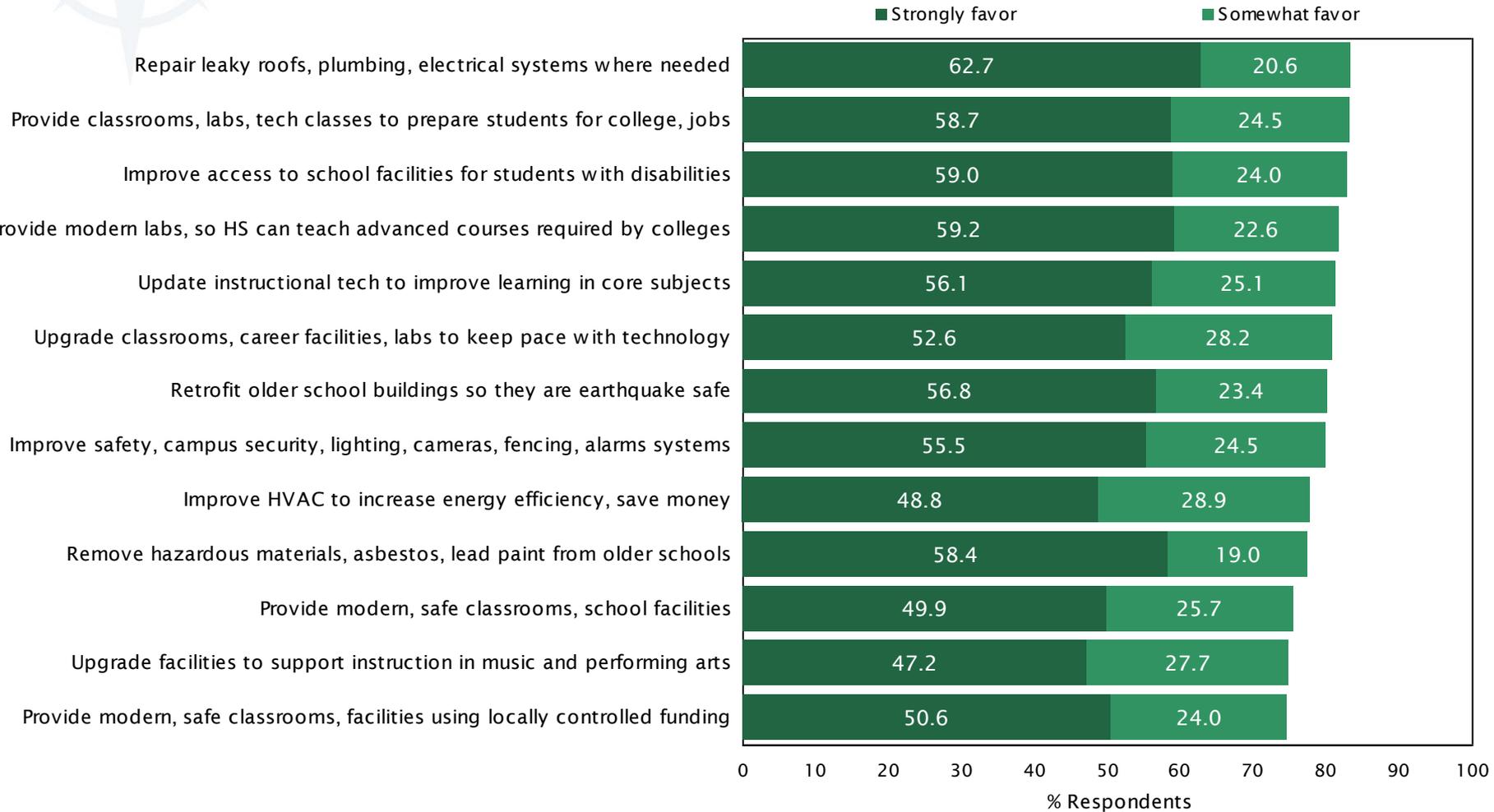
# SUPPORT: AVERAGE OF \$145/\$108 PER YEAR



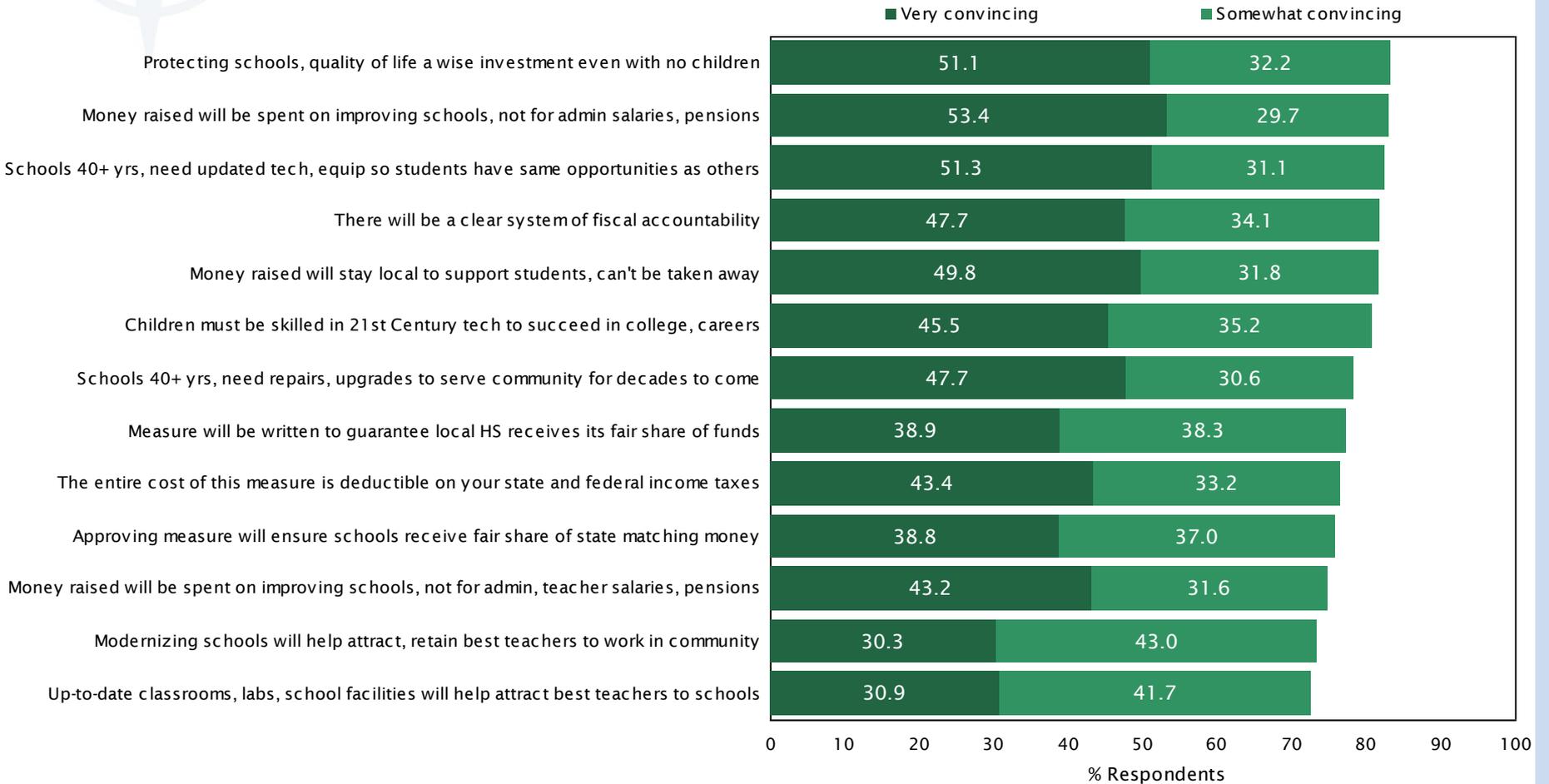
# SUPPORT: AVERAGE OF \$145/\$108 BY OVERALL & HIGH SCHOOL ATTENDANCE AREA



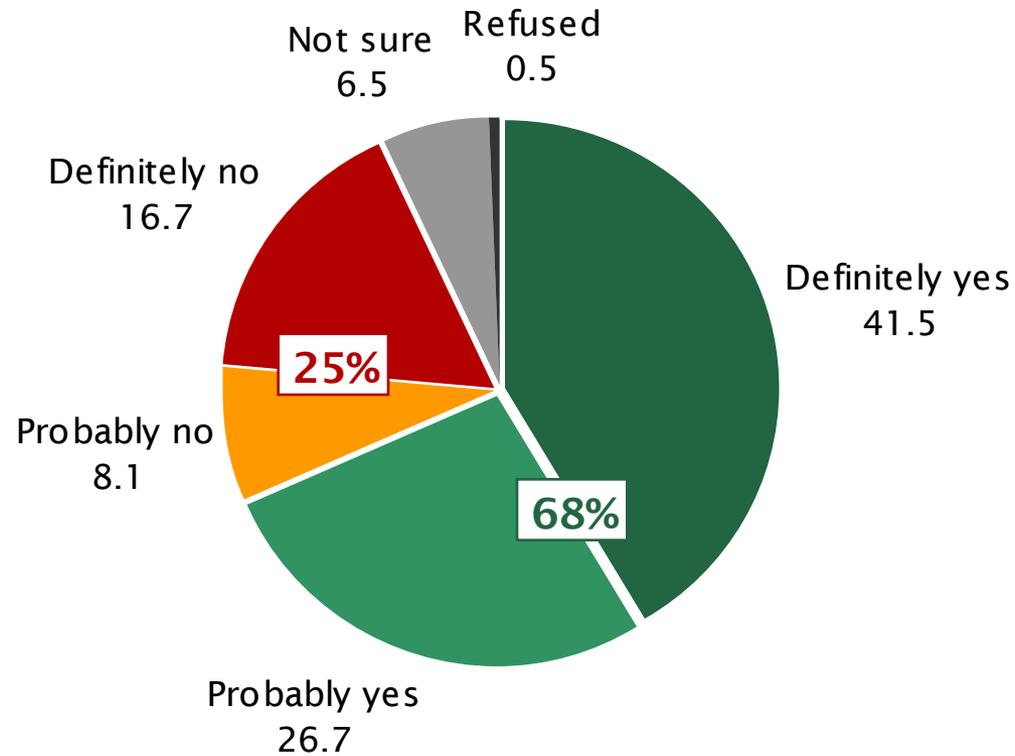
# PROJECTS & PROGRAMS



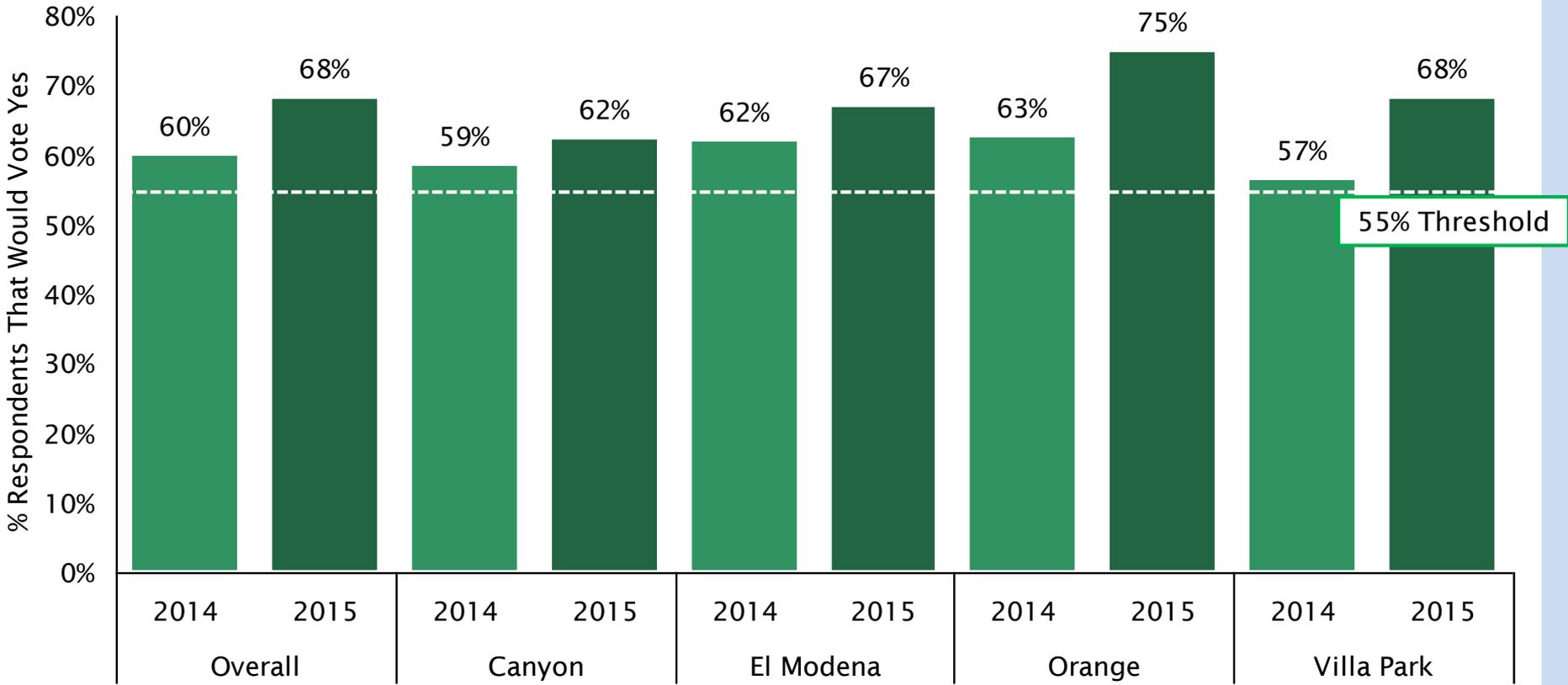
# POSITIVE ARGUMENTS



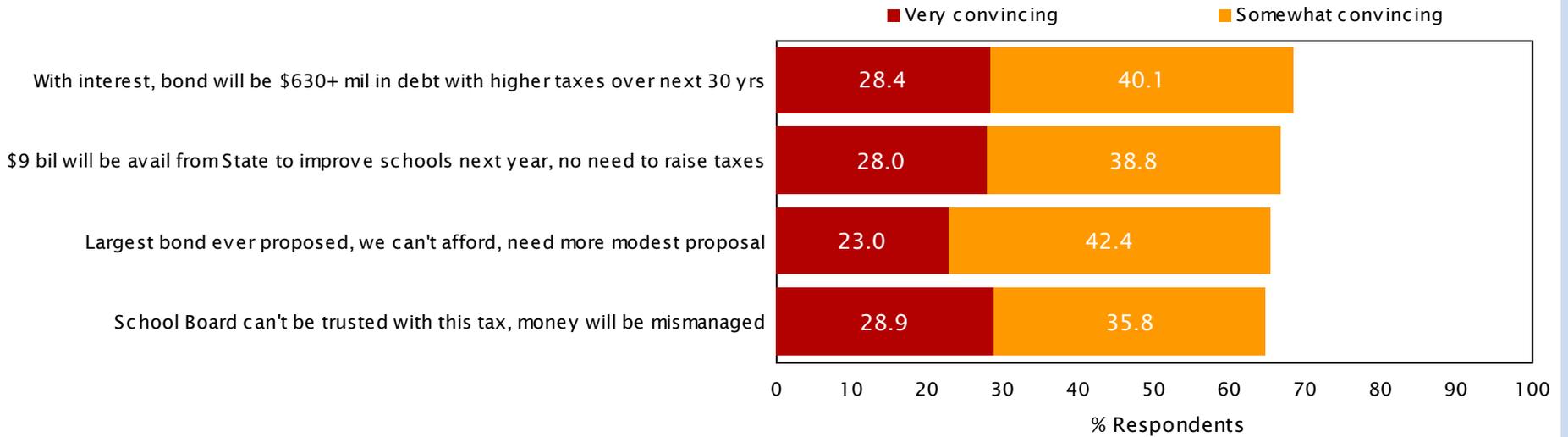
# INTERIM BALLOT TEST



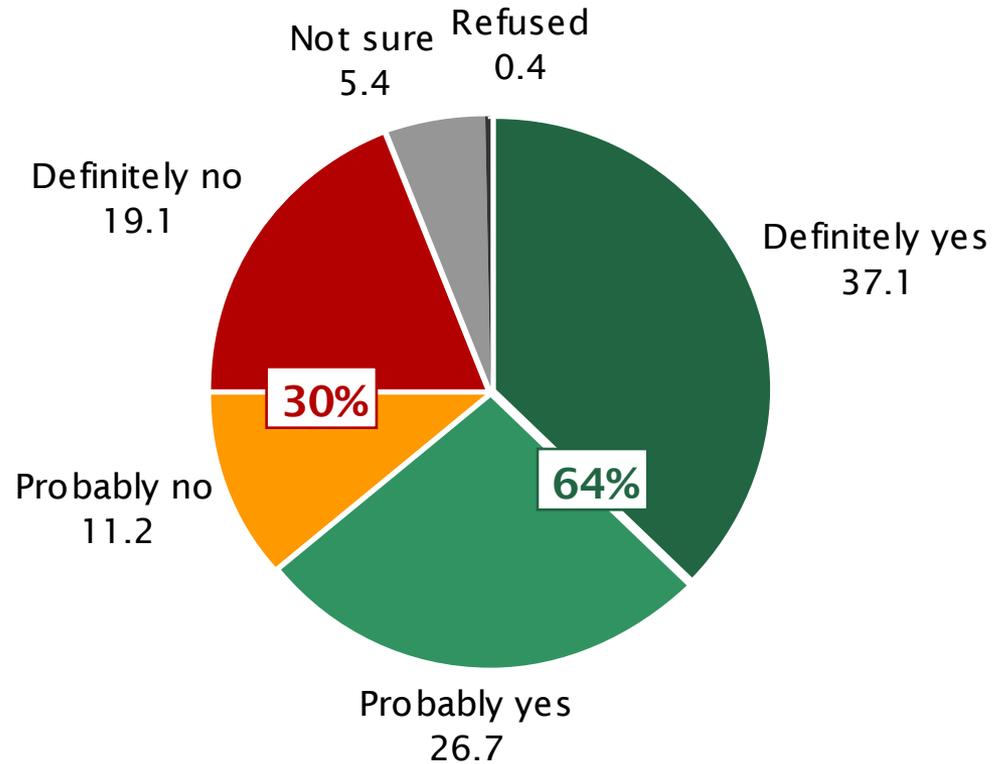
# INTERIM BALLOT TEST BY ATTENDANCE AREA, 2014 & 2015



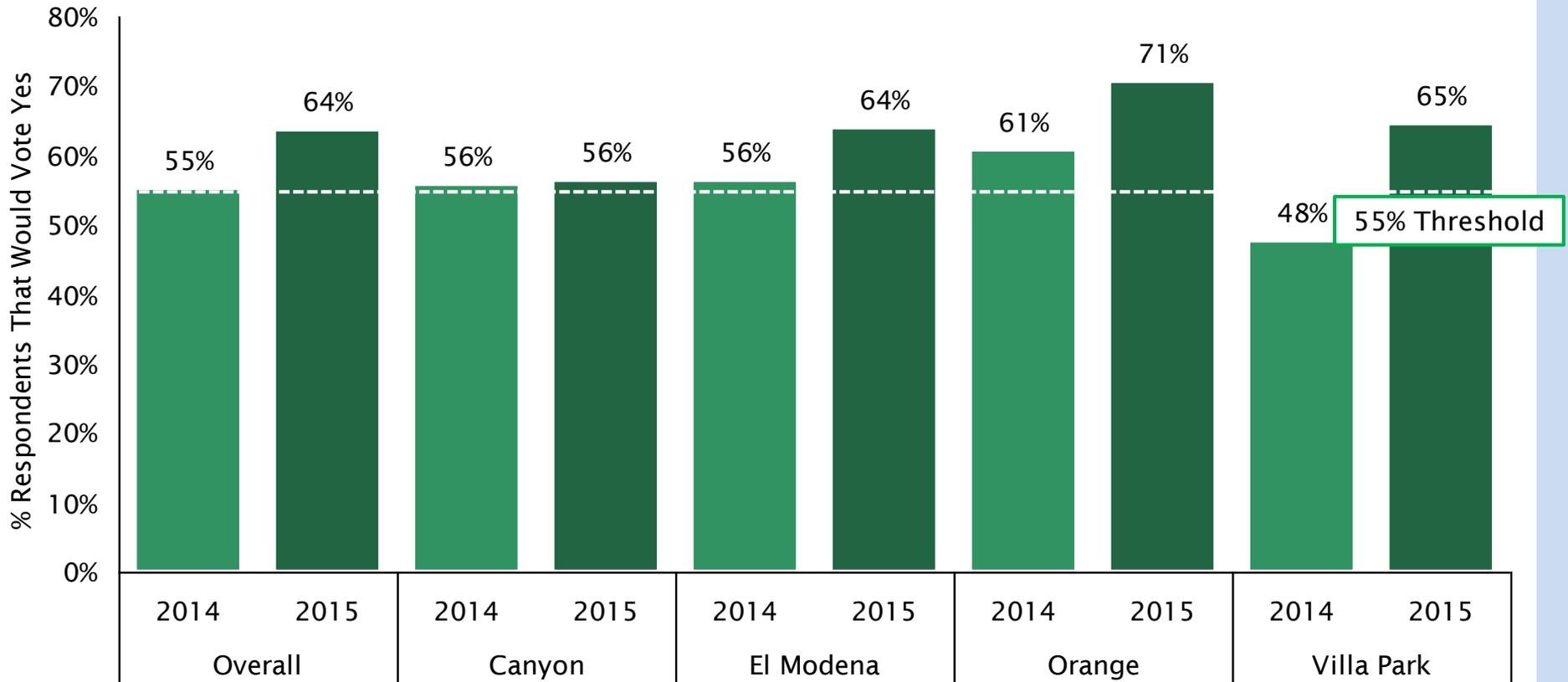
# NEGATIVE ARGUMENTS



# FINAL BALLOT TEST



# FINAL BALLOT TEST BY ATTENDANCE AREA, 2014 & 2015





# KEY CONCLUSIONS

- Is it feasible to move forward with a bond measure?

**Yes.**

- Voters perceive that maintaining the quality of education is the most important issues facing the community
- Strong natural support for bond (68%)
- Popular projects
- Strong positive arguments
- All ballot tests are above the 55% required for passage of Prop. 39 bond
- Support is stronger among November 2016 electorate for the proposed bond when compared to 2014 survey



# CONSIDERATIONS & RECOMMENDATIONS

- Election Date: November 2016 is recommended
- Tax rate: \$34 to \$39 per \$100K AV
- SFIDs or Districtwide bond?: Districtwide bond is recommended
  - Districtwide support ranged from 64% to 69% at key ballot tests
  - At no point did support dip below 55% in HS attendance areas
  - Support did not increase under condition that money raised would be spent in local HS attendance area
  - Tax rate variability within HS attendance areas under SFID approach would be problematic

**Orange Unified School District**

## **School Board Update #2**

**Facilities Assessment & Funding Project**

January 21, 2016

**CliffordMoss.**

# Strategic Priorities

Track 1

## District Due Diligence

Facilities, Technology, Finance, etc...

Track 2

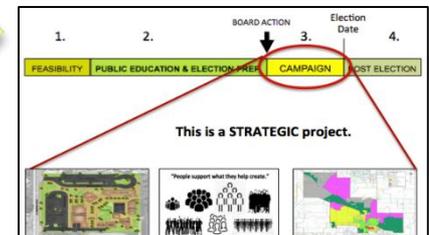
## Board Briefings, Education & Updates

Process, Facilities, Finance, Research, Consensus, etc...

Track 3

## Stakeholder & Opinion Leader Engagement

"People Support What They Help Create."



# Strategic Priorities

## Track 1

### District Due Diligence

Facilities, Technology, Finance, etc...

- To Date: Hired Election Consultant, Pollster, Bond Counsel, Fiscal Advisor SFID Consultant Construction Managers (CMs) and Architects.
- January: **Poll Results / 2016 Feasibility Update**
- February: Form Superintendent's Advisory Council
- March: Community Meetings – Facility NEEDS & Solutions
- Spring: Begin Citizen Oversight Committee Process
- April: Bond Plan Review - Board
- May: Community Consensus
- June-Aug 12<sup>th</sup> : Board Package Review, Action and Filing for the Election

# Strategic Priorities

## Board Briefings, Education & Updates

### Track 2

Process, Facilities, Finance, Research, Consensus, etc...

- November: Listening Tour Findings & Timeline Overview
- December: Finance Update
- **TONIGHT:** **Poll / 2016 Feasibility Update**
- February: Spring Communications Update
- March: Facilities 1 - Issues
- April: Facilities 2 - Bond Plan Review
- Spring: Briefing - Citizen Oversight Committee Process
- May: Tracking Poll + Listening Work Culminates in Reaching Community Consensus
- June – Aug 12<sup>th</sup>: Board Package Review, Action & Filing

# Strategic Priorities

## Stakeholder Engagement

“People Support What They Help Create.”

# Listening →

continues throughout...

1.

2.

BOARD ACTION

3.

Election  
Date

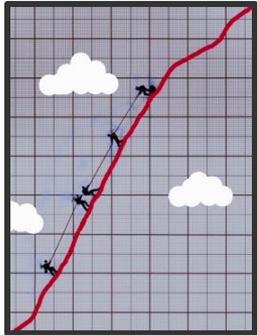
4.



6 months

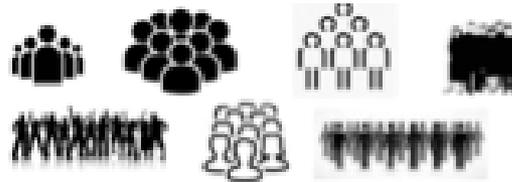
6 months

88 days to Election



## Spring Communications Plan: Rigorous 2-Way Conversation

**People support  
what they help create.**



### Expect to See:

- Superintendent's Advisory Committee Launch
- Direct Mail, Featuring 2-way Listening Communications
- Another Round of School Site Stakeholder Meetings
- Continuing Opinion Leader Conversations
- Public meetings – at Neighborhood Schools
- Online 2-way Listening Activities – web, email, social media

# Wrap Up

## Board Q&A Discussion

## Next...

Feb: Spring Communications Update

Ongoing: Monthly Board Updates

