



RANCHO MURIETA COMMUNITY SERVICES DISTRICT

15160 Jackson Road, Rancho Murieta, CA 95683

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FINANCE COMMITTEE

(Directors John Merchant and Martin Pohll)

Special Meeting

April 14, 2022 at 6:00 p.m.

This meeting will be held via ZOOM video conference only. You can join the conference by (1) logging on to <https://us02web.zoom.us/j/87374714279>, entering Meeting ID no. 873 7471 4279, and using the audio on your computer, or (2) dialing into 1-669-900-9128 and entering the meeting code 873 7471 4279. Those wishing to join with audio only can simply call the telephone number above and enter the code. Participants wishing to join the call anonymously have the option of dialing *67 from their phone. Please refer to your telephone service provider for specific instructions. ***PLEASE NOTE – MOBILE DEVICE USERS MAY NEED TO INSTALL AN APP PRIOR TO USE AND MAC AND PC DESKTOP AND LAPTOP USES WILL REQUIRE YOU TO RUN A ZOOM INSTALLER APPLICATION – PLEASE FOLLOW DIRECTIONS AS PROVIDED BY ZOOM. IT IS RECOMMENDED YOU ATTEMPT TO LOGIN AT LEAST 5 MINUTES BEFORE THE START OF THE MEETING.***

AGENDA

1. Call to Order
2. Consider Finding That as a Result of the COVID-19 Emergency: (i) Meeting in Person Would Present Imminent Risks to the Health or Safety of Attendees; and (ii) the Meeting is Authorized to be Held by Teleconference Pursuant to Gov. Code, § 54953, subd. (e)(1)(C).
3. Comments from the Public
4. Discuss Results From Security Opinion Poll
5. Directors and Staff Comments/Suggestions
6. Adjournment

"In accordance with California Government Code Section 54957.5, any writing or document that is a public record, relates to an open session agenda item and is distributed less than 24 hours prior to a special meeting, will be made available for public inspection in the District offices during normal business hours. If, however, the document is not distributed until the regular meeting to which it relates, then the document or writing will be made available to the public at the location of the meeting."

In compliance with the Americans with Disabilities Act, if you are an individual with a disability and you need a disability-related modification or accommodation to participate in this meeting or need assistance to participate in this teleconference meeting, please contact the District Office at 916-354-3700 or awilder@rmcsd.com. Requests must be made as soon as possible.

Note: This agenda is posted pursuant to the provisions of the Government Code commencing at Section 54950. The date of this posting is April 12, 2022. Posting locations are: 1) District Office; 2) Rancho Murieta Association; 4) Murieta Village Association.

MEMORANDUM

Date: April 12, 2022
To: Finance Committee
From: Tom Hennig, General Manager
Subject: Security Services Survey Results Discussion

RECOMMENDED ACTION

Receive and review the report on the Security Opinion Poll conducted by True North Research. Provide an opportunity for resident voter questions and answers. Give direction to the General Manager for next steps.

BACKGROUND

RMCS D is unique in being the only California Special District to provide in-house, 24-hour security services. Security services at Rancho Murieta are funded by Measure J Special Tax as approved by the voters in 1998. When the voters approved Measure J, they established methods for setting monthly rates for commercial, residential and undeveloped property security services. Measure J provided funding for two (2) gate officers and one (1) patrol officer working 24/7/365. During the first few years, the revenue collected by Measure J provided sufficient funds to support the twenty-four hour per day operations. Over the next few years, rates were increased by an amount less than what was allowable by Measure J due to lower budgetary needs. Approximately ten years later the rates were raised to the maximum allowable under Measure J to keep up with the rising costs, but never exceeded the allowable maximum of two-percent increase annually. As the years progressed, the cost of operations increased and then surpassed the allowable rate increases.

As a result, over the past few years the District began supplementing Security Measure J taxes with general-purpose property tax. This practice became necessary as the cost of security services outpaced revenue growth. For fiscal year 2020-21, the District allocated sixty-five percent (65%) of property tax revenue to support Security. Without a significant change in the level of security services or an influx of new ratepayers, property taxes are no longer enough to fund the gap in Measure J funding. Additionally, the use of property taxes to fund the gap to date has meant that the District's contributions to reserve accounts from property taxes has diminished to the point where large increases in ratepayer contributions are now necessary. In response to this developing situation, the Board of Directors began the process of pursuing the possibility of a new special tax referendum. In June of 2021 the Board approved funding to hire a polling firm to assess the potential voter appetite for passing a new tax.

To make an informed decision, the Board approved moving forward with a voter opinion poll and the contract with True North Research, Inc. to develop a bond feasibility survey and conduct and analyze the survey. The study was completed earlier this year and the analysis has been completed. The next step is for the Board to review the report and decide whether to proceed with placing a second Security special tax referendum on the ballot.

Dr. Timothy McLarney from True North Research, Inc. will present the results at this Finance Committee meeting. The bulk of the report is devoted to conveying the details of the study findings. The results of the study suggest that if structured appropriately, kept affordable and combined with an effective public

outreach/education effort and a solid independent campaign, the proposed special tax measure has a good chance of passage.

DISCUSSION

Given these circumstances, a representative survey was commissioned to provide a quantitative assessment of the views, priorities and perceptions of this issue among the Rancho Murieta community. This survey and associated report inform District leadership whether sufficient support exists among RMCS D voters for a new special tax, which will be levied evenly to every parcel within the District boundaries. If approved as presented to registered voters, the funds will be dedicated entirely to increased security patrol services. Dependent upon the level of funding approved, there may be a consistent level of added Sacramento Sheriff's Patrol services to augment the District staffing based on the needs as determined by District management. If the Board elects to move forward with a special tax referendum, this vote could occur as soon as the general election on November 8, 2022.

The timeline of events leading up to this presentation are as follows:

- RMCS D Board of Directors approves the Fiscal Year 2021-22 budget, with funds allocated to this survey
- True North Research was awarded a contract in the amount of \$29,502 on February 17, 2021
- Townhall meeting with the community held June 22, 2021
- Stakeholder working groups/meetings took place August 25 & 26 2021
- Survey questions were finalized January 2022
- Polling activities began with 3,000 mailers sent February 2, 2022
- Present polling results provided to the Finance Committee April 14, 2022
- If approved, a special tax referendum presentation will be provided to the Board of Directors on April 20, 2022
- Potential referendum education campaign June through November 2022
- Possible voter referendum on November 8, 2022

We are currently at the final stage of determining whether to proceed with a voter referendum for an additional special tax to support Security Patrol services. The results of the survey work completed by True North are being presented at this special Finance Committee meeting. If the Finance Committee elects to place this onto the agenda for the full Board to review, we will add this to the agenda of the Board Meeting that takes place next Wednesday, April 20, 2022.

If approved, staff recommends entering into an agreement with Clifford Moss to provide the appropriate support of the stakeholder communications on behalf of the District. This agreement will be in the amount of \$35,000. These communications will include direct mailings, an online ad package, video shoot and production and miscellaneous expenses to support providing the voters with enough information to make an informed decision on election day. In addition to the education campaign sponsored by the District, it should be noted that most successful initiatives are also supported by a grass roots campaign within the community that may advocate for or against the special tax. This grass roots activity is often the key to the success or failure of the vote. While the District officials are not allowed to support a voter referendum one way or another, we are able to supply data and facts to aid with the voter decision making process. District finance staff will provide the justification required to support the sole source agreement with Clifford Moss as part of the package provided to the Board next week.

In addition to the proposed agreement with Clifford Moss, the costs for running the election will include costs of the County Registrar of Voters. These estimated costs, which are provided by the County are based on 5,000 registered voters (there are currently 4,861 registered voters within the District boundary). The general election for the three open Board of Director positions will run \$6,147.50. Adding a special tax referendum, which is considered a second contest for District voters will run an additional \$517.50. If there are three or fewer candidates for the Director positions, the special tax will be considered the first contest and will run \$6,147.50 for the estimated 5,000 voters. If approved by the Board, the estimated expenditure to date, plus the additional costs describe above will be \$65,000, exclusive of staffing time. According to our experts, as the election date nears, there is often a supplemental poll to voters to provide a final estimate of the potential for a successful outcome, which may add additional costs, which we are estimating to be \$10,000. Finally, there will also be a legal component, if and when the formal application is filed with the county. District legal counsel provided an estimate of \$15,000 for finalizing the measure and filing with the county. This will bring the total estimated cost for placing the special tax measure on the November 8, 2022, ballot to \$90,020. The deadline for placing an item on the ballot is August 1, 2022.

Rancho Murieta Special Tax Measure Cost Estimates

Vendor	Amount
Contract with True North	\$29,502
Estimated payment to County Elections	\$518
Clifford Moss estimate with additional polling	\$45,000
Estimated legal costs	\$15,000
Total estimated cost to place on ballot	\$90,020

SUMMARY

The Finance Committee will receive a report and professional recommendations on the opinion poll report conducted by True North Research. Additionally, the public now has access to the results of the poll which provide a scientific basis for the likelihood of passing a special tax which would complement Measure J as approved by District voters in 1997. If directed by the Finance Committee, District staff will add this item to the agenda for the regularly scheduled Board meeting next week or for a later meeting. If requested to place on the agenda next week, the final board memo will be posted no later than Monday, April 18, 2022, which will allow for sufficient time for the District voters to review.

Section 1: Introduction to Study

Hi, may I please speak to _____. My name is _____, and I'm calling from TNR on behalf of the Rancho Murieta (MUR-ee-Eta) Community Services District. We're conducting a survey of voters about important issues in the community and I'd like to get your opinions.

If needed: This is a survey about important issues in your community. I'm NOT trying to sell anything and I won't ask for a donation.

If needed: The survey should take about 10 minutes to complete.

If needed: If now is not a convenient time, can you let me know a better time so I can call back?

If the person asks why you need to speak to the listed person or if they ask to participate instead, explain: For statistical purposes, at this time the survey must only be completed by this particular individual.

Section 2: Quality of Life & Local Issues

Q1	To begin, how long have you lived in Rancho Murieta (MUR-ee-Eta)?		
	1	Less than 1 year	2%
	2	1 to 4 years	21%
	3	5 to 9 years	15%
	4	10 to 14 years	10%
	5	15 to 19 years	17%
	6	20 years or longer	35%
	99	Prefer not to answer	0%
Q2	How would you rate the overall quality of life in your community? Would you say it is excellent, good, fair, poor or very poor?		
	1	Excellent	53%
	2	Good	44%
	3	Fair	3%
	4	Poor	0%
	5	Very Poor	0%
	98	Not sure	0%
	99	Prefer not to answer	0%

Q3	If you could change <i>one</i> thing to make Rancho Murieta (MUR-ee-Eta) a better place to live, what change would you like to see? Verbatim responses recorded and later grouped into categories below.						
	Improve public safety, security, reduce crime	26%					
	Provide new country club, community center, pool	20%					
	Limit growth, development	9%					
	Enforce community rules, codes	9%					
	No changes needed / Everything is fine	8%					
	Not sure / Cannot think of anything	7%					
	Beautify communities, landscaping	4%					
	Enforce traffic laws, reduce speeding	4%					
	Provide more community events, activities for all ages	3%					
	Improve government structure, leadership, communication	3%					
	Improve RMCC	2%					
	Reduce fees, taxes	2%					
	Attract stores, dining, shopping opportunities	2%					
	Improve infrastructure, roads	2%					
	Improve planning, development	2%					
	Improve diversity of communities, events	2%					
	Allow, improve access, permits through gate	2%					
Q4	Next, I'm going to read a list of issues facing your community and for each one, please tell me how important you feel the issue is to <u>you</u> , using a scale of extremely important, very important, somewhat important or not at all important.						
	Here is the (first/next) issue: _____. Do you think this issue is extremely important, very important, somewhat important, or not at all important?						
	<i>Randomize</i>	Extremely Important	Very Important	Somewhat Important	Not at all Important	Not sure	Prefer not to answer
A	Maintaining local streets and roads	31%	53%	14%	1%	0%	0%
B	Managing growth and development	49%	31%	16%	3%	0%	0%
C	Preventing trespassing in the community	60%	24%	14%	2%	0%	0%
D	Improving public safety	41%	32%	23%	3%	1%	0%
E	Preventing local tax increases	30%	30%	32%	6%	1%	1%
F	Protecting local property values	56%	31%	10%	3%	0%	1%
G	Maintaining a low crime rate	70%	22%	6%	2%	0%	0%
H	Preparing for emergencies and natural disasters	30%	37%	28%	4%	0%	0%

I	Maintaining an ample supply of safe drinking water	80%	17%	2%	0%	0%	0%
J	Preventing unauthorized access to Calero and Chesbro reservoirs	31%	32%	28%	8%	1%	1%

Section 3: Initial Ballot Test

Next year, voters in your community may be asked to vote on a local ballot measure. Let me read you a summary of the measure.

Q5	In order to:			
	<ul style="list-style-type: none"> Prevent crime and better protect the lives and property of Rancho Murieta residents and businesses Provide additional patrols by Sheriff’s deputies and security patrol staff And continue gated security 24 hours per day, year round 			
	Shall the Rancho Murieta Community Services District measure be approved levying \$298 annually per parcel, providing 800 thousand dollars annually until ended by voters, with all money staying local?			
	If the election were held today, would you vote yes or no on this measure? <i>Get answer, then ask: Would that be definitely (yes/no) or probably (yes/no)?</i>			
	1	Definitely yes	31%	Skip to Q7
	2	Probably yes	29%	Skip to Q7
	3	Probably no	14%	Ask Q6
4	Definitely no	16%	Ask Q6	
98	Not sure	8%	Ask Q6	
99	Prefer not to answer	1%	Skip to Q7	
Q6	Is there a particular reason why you do not support or are unsure about the security measure I just described? <i>If yes, ask: Please briefly describe your reason. Verbatim responses recorded and later grouped into categories below.</i>			
	Public safety, security is okay as-is, no need for more money	22%		
	Taxes, fees already too high	19%		
	Need more information	18%		
	Money is misspent, mismanaged	11%		
	Measure is too expensive	11%		
	Negative comments about police, security patrols	8%		
	Not sure / No particular reason	7%		
	Other ways to be funded	4%		
	Do not trust CSD	3%		
	Mentioned past measures	2%		
	Other higher priorities in community	2%		

Section 4: Tax Threshold							
Q7	The measure I just described would raise money through annual property taxes paid by residential and commercial property owners. However, the amount to be charged to each parcel has not been determined yet. If you knew that your household would pay an additional _____ per year, would you vote yes or no on the measure? <i>Get answer, then ask: Would that be definitely (yes/no) or probably (yes/no)?</i>						
<i>Read in sequence starting with the highest amount (A), then the next highest (B), and so on. If respondent says 'definitely yes', record 'definitely yes' for all LOWER dollar amounts and go to next section.</i>							
	<i>Ask in Order</i>	Definitely Yes	Probably Yes	Probably No	Definitely No	Not sure	Prefer not to answer
A	298 dollars	27%	29%	15%	17%	10%	1%
B	248 dollars	28%	29%	15%	17%	9%	1%
C	198 dollars	37%	25%	12%	16%	9%	1%
D	96 dollars	51%	22%	8%	10%	7%	1%

Section 5: Services & Improvements							
Q8	The measure we've been discussing would provide funding for a variety of security services and improvements. <u>If the measure passes</u> , would you favor or oppose using some of the money to: _____, or do you not have an opinion? <i>Get answer, if favor or oppose, then ask: Would that be strongly (favor/oppose) or somewhat (favor/oppose)?</i>						
	<i>Read A, B & C first, then randomize remaining items.</i>	Strongly Favor	Somewhat Favor	Somewhat Oppose	Strongly Oppose	Not sure	Prefer not to answer
A	Continue providing security gate officers 24 hours per day, year-round, to control community access and prevent trespassing	81%	9%	2%	5%	2%	0%
B	Provide private security patrols and emergency response 24 hours per day, year-round	55%	23%	7%	10%	4%	1%
C	Provide additional patrols by Sheriff's deputies with full law enforcement powers	48%	26%	10%	11%	4%	0%
D	Better enforce speed limits and safe driving practices	33%	38%	14%	9%	5%	1%
E	Reduce vandalism, graffiti, and property damage	65%	26%	4%	3%	2%	0%
F	Reduce trespassing by non-residents	63%	26%	4%	4%	2%	0%
G	Enforce RMA rules	35%	35%	14%	10%	4%	1%
H	Deter major crimes including burglary and theft	76%	16%	2%	4%	2%	1%
I	Patrol open space areas to reduce trespassing and fire risk	45%	38%	7%	5%	5%	0%

Section 6: Positive Arguments							
What I'd like to do now is tell you what some people are saying about the measure we've been discussing.							
Q9	Supporters of the measure say: _____. Do you think this is a very convincing, somewhat convincing, or not at all convincing reason to SUPPORT the measure?						
	<i>Randomize. Split Sample C1 & C2</i>	Very Convincing	Somewhat Convincing	Not At All Convincing	Don't Believe	Not sure	Prefer not to answer
A	All money raised by this measure will be spent to provide security, safety, and law enforcement services in Rancho Murieta. The money can't be taken away by the State or used for other purposes.	45%	26%	12%	11%	4%	2%
B	There will be a clear system of accountability including independent audits, citizen oversight, and annual reports to the community to ensure that the money is spent properly.	33%	36%	16%	11%	3%	1%
C1	One of the main reasons people move to Rancho Murieta is to be in a safe, gated community with private security. If we want to keep our community safe, we need to support this measure.	44%	29%	16%	6%	2%	2%
C2	The choice is ours - we can invest in keeping Rancho Murieta a safe and secure place to live, or we can cut back on private security and be like any other community.	32%	24%	27%	9%	5%	2%
D	Earlier this year, California made more than 76,000 (seventy-six thousand) prisoners eligible for early parole, which means a lot more criminals are being released into the greater Sacramento area. This measure provides the funds needed to combat crime in our community.	22%	25%	34%	14%	3%	2%
E	This measure will ensure that we always have a security officer available to respond quickly to emergencies - day or night. If we cut back on security, that won't be the case.	41%	31%	14%	9%	4%	2%
F	By keeping our community safe and secure, this measure will help protect our property values and keep Rancho Murieta a special place to live.	40%	38%	14%	5%	2%	1%
G	The District does not receive the revenues needed to continue providing security services at their current levels. If this measure doesn't pass, the District will be forced to cut back on security officers and security patrols.	33%	30%	18%	13%	4%	2%

Section 7: Interim Ballot Test		
Sometimes people change their mind about a measure once they have more information about it. Now that you have heard a bit more about the measure, let me read you a summary of it again.		
Q10	<p>In order to:</p> <ul style="list-style-type: none"> Prevent crime and better protect the lives and property of Rancho Murieta residents and businesses Provide additional patrols by Sheriff’s deputies and security patrol staff And continue gated security 24 hours per day, year round <p>Shall the Rancho Murieta Community Services District measure be approved levying \$298 annually per parcel, providing 800 thousand dollars annually until ended by voters, with all money staying local? If the election were held today, would you vote yes or no on this measure? <i>Get answer, then ask:</i> Would that be definitely (yes/no) or probably (yes/no)?</p>	
1	Definitely yes	31%
2	Probably yes	27%
3	Probably no	14%
4	Definitely no	19%
98	Not sure	8%
99	Prefer not to answer	1%

Section 8: Negative Arguments							
Next, let me tell you what opponents of the measure are saying.							
Q11	Opponents of the measure say: _____. Do you think this is a very convincing, somewhat convincing, or not at all convincing reason to OPPOSE the measure?						
	<i>Randomize</i>	Very Convincing	Somewhat Convincing	Not At All Convincing	Don't Believe	Not sure	Prefer not to answer
A	Property owners are already paying the District a lot of money for water, sewer, and security. The District has plenty of money – they just need to do a better job managing it.	29%	36%	18%	11%	5%	1%
B	Many of our residents and local businesses have been hit hard by the pandemic and are struggling to stay afloat. Now is <i>not</i> the time to raise taxes.	21%	31%	31%	11%	5%	2%
C	This tax will last forever. There is no expiration date.	30%	28%	26%	8%	7%	1%
D	The tax amount will automatically increase 3% every year.	25%	27%	23%	12%	11%	1%
E	They should outsource security to a private company. We’d get more for our money.	10%	23%	34%	22%	10%	1%

Section 9: Final Ballot Test

Now that you have heard a bit more about the measure, let me read you a summary of it one more time.

Q12	In order to: <ul style="list-style-type: none"> Prevent crime and better protect the lives and property of Rancho Murieta residents and businesses Provide additional patrols by Sheriff’s deputies and security patrol staff And continue gated security 24 hours per day, year round Shall the Rancho Murieta Community Services District measure be approved levying \$298 annually per parcel, providing 800 thousand dollars annually until ended by voters, with all money staying local?			
	If the election were held today, would you vote yes or no on this measure? <i>Get answer, then ask: Would that be definitely (yes/no) or probably (yes/no)?</i>			
	1	Definitely yes	29%	Skip to Q14
	2	Probably yes	27%	Skip to Q14
	3	Probably no	17%	Ask Q13
	4	Definitely no	18%	Ask Q13
	98	Not sure	8%	Ask Q13
	99	Prefer not to answer	1%	Skip to Q14
Q13	What if the tax rate were set at a <i>lower</i> amount -- \$171 per year? This is the amount needed to continue providing the <i>current</i> levels of security in the community and avoid having to make deep cuts to security patrols.			
	Would you vote yes or no on the measure at this rate to <i>maintain</i> the current levels of security services? <i>Get answer, then ask: Would that be definitely (yes/no) or probably (yes/no)?</i>			
		Def, prob yes @ \$298 (Q12)	56%	
	1	Definitely yes	2%	
	2	Probably yes	8%	
	3	Probably no	12%	
	4	Definitely no	12%	
	98	Not sure	8%	
	99	Prefer not to answer	1%	

Section 10: Privatizing Security				
Q14	Security services are provided directly by the Rancho Murieta Community Services District, which is a public agency. Some have suggested that security should be outsourced to a private company. In general, which do <i>you</i> prefer – that security continue to be provided by the Community Service District, or that it be outsourced to a private security company?			
	1	Continue to be provided by Community Services District	56%	Ask Q15
	2	Outsourced to a private security company	13%	Skip to Q16
	98	Not sure	28%	Ask Q15
	99	Prefer not to answer	3%	Skip to Q16
Q15	Outsourcing to a private security company would result in an estimated savings of 20% in the costs of providing services. Knowing this, which do you prefer – that security continue to be provided by the Community Service District, or that it be outsourced to a private security company?			
	1	Continue to be provided by Community Services District	49%	
	2	Outsourced to a private security company	23%	
	98	Not sure	27%	
	99	Prefer not to answer	1%	

Section 11: Relevant Attitudes & Background				
Thank you so much for your participation. I have just a few background questions for statistical purposes.				
Q16	Overall, how safe is Rancho Murieta as a place to live? Would you say it is very safe, somewhat safe, somewhat unsafe, or very unsafe?			
	1	Very safe	65%	
	2	Somewhat safe	32%	
	3	Somewhat unsafe	2%	
	4	Very unsafe	0%	
	98	Not sure	0%	
	99	Prefer not to answer	0%	

<i>Ask Q17 if Q1 = (3-7). Otherwise skip to Q18.</i>		
Q17	When compared to five years ago, would you say Rancho Murieta is safer today, about the same, or less safe?	
	1	Safer today
	2	About the same
	3	Less safe today
	98	Not sure
	99	Prefer not to answer
Q18	What is the public safety issue or security problem that you'd <i>most</i> like to see addressed in your community?	
		Gate access, security
		Theft, vandalism
		Need 24/7 patrol, presence
		No public safety, security problems
		Not sure / Cannot think of anything specific
		Violation of traffic laws, speeding
		Crime in general
		Not enough security staff
		Holding residents accountable for their children's behavior
		Underage drivers, children driving golf carts
		Faster response to residents
		Enforcement of CSD, HOA rules, laws
		Lack of respect for police, security
Those are all of the questions that I have for you. Thanks so much for participating in this important survey.		

<i>Post-Interview & Sample Items</i>		
S1	Gender	
	1	Male
	2	Female
	3	Prefer not to answer

S2	Party		
	1	Democrat	25%
	2	Republican	54%
	3	Other	5%
	4	DTS	16%
S3	Age on Voter File		
	1	18 to 29	8%
	2	30 to 39	9%
	3	40 to 49	13%
	4	50 to 64	29%
	5	65 or older	42%
S4	Registration Date		
	1	Since Nov 2018	7%
	2	Jun 2012 to before Nov 2018	18%
	3	Jun 2006 to before Jun 2012	6%
	4	Before June 2006	68%
S5	Household Party Type		
	1	Single Dem	10%
	2	Dual Dem	9%
	3	Single Rep	14%
	4	Dual Rep	28%
	5	Single Other	6%
	6	Dual Other	6%
	7	Dem & Rep	5%
	8	Dem & Other	7%
	9	Rep & Other	13%
	0	Mixed (Dem + Rep + Other)	1%
S6	Homeowner on Voter File		
	1	Yes	85%
	2	No	15%

S7	Likely to Vote by Mail		
	1	Yes	75%
	2	No	25%
S8	Likely June 2022 Voter		
	1	Yes	78%
	2	No	22%
S9	Likely November 2022 Voter		
	1	Yes, natural	95%
	2	Yes, GOTV	5%

DRAFT

SECURITY MEASURE VOTER SURVEY
SUMMARY REPORT

PREPARED FOR THE
RANCHO MURIETA CSD



MARCH 14, 2022



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INTRODUCTION

Rancho Murieta Community Services District (District) was formed in 1982 by State Government Code 61000 to provide essential services in Rancho Murieta. Located in the beautiful wooded hills of eastern Sacramento County, the District provides water, wastewater, solid waste collection, storm drainage and flood control, street lighting, and security services to a community spanning approximately 3,500 acres.

In 1997, Rancho Murieta voters approved a special tax (Measure J) to fund ongoing security services including operating security gates 24 hours per day, providing mobile security patrols, and related ancillary services. Although Measure J originally provided sufficient funding for security services, over the past 25 years the costs of providing security services have outpaced Measure J revenues, creating an annual deficit that has grown to approximately \$450,000 in recent years. In order to sustain current service levels and provide select enhancements (e.g., additional Sheriff's patrols), the District will need the financial support of the community it serves through the passage of a local parcel tax measure.

MOTIVATION FOR RESEARCH The primary purpose of this study was to produce an unbiased, statistically reliable evaluation of voters' interest in supporting a local parcel tax to fund security services. Additionally, should the District decide to move forward with a revenue measure, the survey can guide how best to structure a measure so that it is consistent with the community's priorities and expressed needs. Specifically, the study was designed to:

- Gauge current, baseline support for a local parcel tax measure to fund security services
- Identify the tax rate that the community is willing to support
- Identify the types of services that voters are most interested in funding, should the measure pass
- Expose voters to arguments in favor of, and against, the proposed tax measure to gauge how information affects support for the measure, *and*
- Estimate support for the measure once voters are presented with the types of information they will likely be exposed to during the election cycle.

OVERVIEW OF METHODOLOGY For a full discussion of the research methods and techniques used in this study, turn to *Methodology* on page 36. In brief, the survey was administered to a random sample of 673 registered voters in the District who are likely to participate in the November 2022 election either on the natural or as a result of get-out-the-vote efforts. The survey followed a mixed-method design that employed multiple recruiting methods (mail, email, text, and phone) and multiple data collection methods (phone and online). Administered between February 5 and February 17, 2022, the average interview lasted 17 minutes.

ORGANIZATION OF REPORT This report is designed to meet the needs of readers who prefer a summary of the findings as well as those who are interested in the details of the results. For those who seek an overview of the findings, the sections titled *Just the Facts* and *Conclusions* are for you. They provide a summary of the most important factual findings of the survey in bullet-point format and a discussion of their implications. For the interested reader, this section is followed by a more detailed question-by-question discussion of the results from the survey by topic area (see *Table of Contents*), as well as a description of the methodology employed for col-

lecting and analyzing the data. And, for the truly ambitious reader, the questionnaire used for the interviews is contained at the back of this report (see *Questionnaire & Toplines* on page 39) and a complete set of crosstabulations for the survey results is contained in Appendix A.

ACKNOWLEDGMENTS True North thanks the Rancho Murieta Community Services District for the opportunity to assist the District in this important effort. The collective expertise, local knowledge, and insight provided by district representatives and staff improved the overall quality of the research presented here.

DISCLAIMER The statements and conclusions in this report are those of the authors (Dr. Timothy McLarney and Richard Sarles) at True North Research, Inc. and not necessarily those of the Rancho Murieta Community Services District. Any errors and omissions are the responsibility of the authors.

ABOUT TRUE NORTH True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the values, perceptions, priorities, and concerns of their residents and voters. Through designing and implementing scientific surveys, focus groups, and one-on-one interviews as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas—such as planning, policy evaluation, performance management, establishing fiscal priorities, passing revenue measures, and developing effective public information campaigns.

During their careers, Dr. McLarney and Mr. Sarles have designed and conducted over 1,200 survey research studies for public agencies, including more than 400 revenue measure feasibility studies. Of the measures that have gone to ballot based on Dr. McLarney’s recommendation, 95% have been successful. In total, the research that Dr. McLarney has conducted has led to over \$34 billion in successful local revenue measures.



JUST THE FACTS

The following section is an outline of the main factual findings from the survey. For the reader's convenience, we have organized the findings according to the section titles used in the body of this report. Thus, if you would like to learn more about a particular finding, simply turn to the appropriate report section.

QUALITY OF LIFE & LOCAL ISSUES

- Nearly all voters (97%) shared favorable opinions of the quality of life in Rancho Murieta, with 53% reporting it is excellent and 44% stating it is good. Approximately 3% of voters surveyed said the quality of life in the community is fair, whereas less than 1% used poor or very poor to describe the quality of life in Rancho Murieta.
- When provided an open-ended opportunity to identify the change they would most like to see that would make Rancho Murieta a better place to live, approximately 15% could not think of a change they desire or reported that no changes are needed/everything is fine. Among the specific changes desired, the most common were improving public safety and security/reducing crime (26%), providing a new country club/community center/pool (20%), limiting growth and development (9%), and enforcing community rules/codes (9%).
- When provided with 10 specific issues and asked to rate the importance of each, maintaining an ample supply of safe drinking water received the highest percentage of respondents indicating that the issue was either extremely or very important (97%), followed by maintaining a low crime rate (92%), protecting local property values (87%), maintaining local streets and roads (84%), and preventing trespassing in the community (84%).
- Given the purpose of this study, it is instructive to note that preventing local tax increases (60%) was rated lower in importance than security-related items including maintaining a low crime rate (92%), preventing trespassing in the community (84%), and improving public safety (73%).

INITIAL BALLOT TEST

- With only the information provided in the ballot language, 60% of likely November 2022 voters surveyed indicated they would support the \$298 parcel tax measure at this stage in the survey, whereas 31% stated they would oppose the measure and 9% were unsure or unwilling to share their vote choice.
- Among the minority of voters who initially opposed the parcel tax measure (or were unsure), the most frequently mentioned specific reasons for their position were a perception that safety and security are fine as is/there is no need for additional funding was the most common (22%), concerns that taxes/fees are too high already (19%), and a need for more information (18%).

TAX THRESHOLD

- When voters' attention was focused on the tax rate, 56% of those surveyed indicated that they would vote in favor of the measure if the rate were set at \$298 per year. Reducing the tax rate resulted in increased support for the measure, with 73% of those surveyed indicating they would support the proposed measure at the lowest rate tested (\$96 per year).

SERVICES & PROGRAMS

- Although all potential uses of parcel tax proceeds tested were favored by at least seven-in-ten voters surveyed, the items that resonated with the largest percentage of respondents were deterring major crimes including burglary and theft (92% strongly or somewhat favor), continuing to provide security gate officers 24 hours per day, year round, to control community access and prevent trespassing (91%), reducing vandalism, graffiti, and property damage (91%), and reducing trespassing by non-residents (90%).

POSITIVE ARGUMENTS

When presented with arguments in favor of the measure, voters found the following arguments to be the most persuasive:

- *By keeping our community safe and secure, this measure will help protect our property values and keep Rancho Murieta a special place to live.*
- *One of the main reasons people move to Rancho Murieta is to be in a safe, gated community with private security. If we want to keep our community safe, we need to support this measure.*
- *This measure will ensure that we always have a security officer available to respond quickly to emergencies - day or night. If we cut back on security, that won't be the case.*
- *All money raised by this measure will be spent to provide security, safety, and law enforcement services in Rancho Murieta. The money can't be taken away by the State or used for other purposes.*

INTERIM BALLOT TEST

- After presenting respondents with the wording of the proposed measure, possible tax rates, services and programs that could be funded, as well as arguments in favor of the proposal, overall support for the \$298 parcel tax measure among likely November 2022 voters decreased slightly to 58%, with 31% of voters indicating that they would *definitely* vote yes on the measure. Approximately 33% of respondents opposed the measure at this point in the survey, and an additional 9% were unsure or unwilling to state their vote choice.

NEGATIVE ARGUMENTS

Of the arguments in opposition to the measure, voters found the following arguments to be the most persuasive:

- *Property owners are already paying the District a lot of money for water, sewer, and security. The District has plenty of money, they just need to do a better job managing it.*
- *This tax will last forever. There is no expiration date.*
- *The tax amount will automatically increase 3% every year.*

FINAL BALLOT TEST

- After presenting respondents with the wording of the proposed measure, possible tax rates, programs and services that could be funded, as well as arguments in favor of and against the proposal, support for the \$298 parcel tax measure was found among 56% of likely November 2022 voters surveyed, with 29% indicating they would *definitely* support the measure. Approximately 35% of respondents opposed the measure at the Final Ballot Test, and 10% were unsure or unwilling to state their vote choice.
- Lowering the parcel tax to \$171 per year in the context of continuing existing levels of service generated approximately 10% additional support for the measure, bringing total support to 66%. It should be noted, however, that most of the additional support was 'soft' (probably yes).

RELATED ATTITUDES

- A majority of respondents (56%) preferred that security services continue to be provided by the District, whereas 13% preferred that they be outsourced to a private company. The remaining respondents were either unsure (28%) or preferred to not answer the question (3%).
- After introducing the notion that privatizing security would result in an estimated savings of 20% in the costs of providing security services, Rancho Murieta residents still tended to prefer that security services be provided by the District (41%) rather than outsourced to a private security company (32%). Approximately 27% remained unsure (23%) or unwilling to answer the question (4%).
- Nearly all respondents viewed Rancho Murieta as either a very safe (65%) or somewhat safe (33%) place to live, with just 2% indicating it is somewhat unsafe.
- The above notwithstanding, nearly half (49%) of respondent also felt that Rancho Murieta is less safe today than it was five years ago, with nearly all of the remaining respondents being of the opinion that the level of safety today is about the same as five years ago (49%).
- When asked in an open-ended manner to describe the most pressing safety or security issue facing the community that they'd like to see addressed, the most frequently mentioned issues were gate access/security (22%), theft and vandalism (19%), and the need for 24 hour/7 day per week patrols and security presence (12%).



CONCLUSIONS

The bulk of this report is devoted to conveying the details of the study findings. In this section, however, we attempt to ‘see the forest through the trees’ and note how the collective results of the survey answer the key questions that motivated the research. The following conclusions are based on True North’s interpretations of the survey results and the firm’s collective experience conducting revenue measure studies for public agencies throughout the State.

Is a parcel tax measure feasible for November 2022?

Voters in Rancho Murieta consider maintaining a low crime rate/safety and security to be among the most important issues facing the community. When it comes to funding safety and security services, however, voters’ interest in these services is in tension with their sensitivity to raising local taxes.

The results of this survey indicate that a parcel tax *may* be feasible for the November 2022 ballot provided that it is kept affordable, focuses on services and improvements that voters identify as their priorities, *and* is accompanied by robust community/opinion leader engagement, education, and communication (more on this below).

Having stated that a parcel tax measure may be feasible, it is important to note that the measure’s prospects will be shaped by external factors and that all revenue measures must overcome challenges prior to being successful. The proposed measure is no exception. With this in mind, if the District is inclined to pursue a parcel tax in 2022 to address its security needs, we recommend that the District expand the conversation with the community regarding its needs and plans, proceed with November 2022 in mind, but take the pulse of the community in early summer 2022 (after community outreach and education) before making an official decision to place a measure on the November 2022 ballot.

How will the tax rate affect support for the measure?

Naturally, the willingness of voters to support a specific revenue measure is contingent, in part, on the tax rate associated with a measure. The higher the rate, all other things being equal, the lower the level of aggregate support that can be expected. It is critical that the rate be set at a level that the necessary proportion of voters view as affordable.

One of the striking patterns in the survey data is that some voters are price sensitive with respect to the proposed parcel tax measure, especially when their attention is focused on the tax rate. Although 60% of respondents supported a \$298 parcel tax at the Initial Ballot Test, when their attention was later focused on the tax rate, support at \$298 dropped to 56%. Learning more about the services to be funded by the parcel tax and being exposed to positive arguments about the measure returned voter support for a \$298 parcel tax to 58% by the Interim Ballot Test, but even at this point support still fell short of the required two-thirds threshold for passage at that rate.

Choosing the appropriate tax rate is likely to be the most difficult decision the District will have to make with respect to the proposed measure. The higher the rate, the greater the risk that the measure fails to achieve the two-thirds supermajority required for passage. The lower the rate, the lower the revenue and the less impact the measure will have on the District’s security operations. True North looks forward to continuing this conversation with the District with the goal of finding a rate that strikes the right balance given the District’s needs *and* the political challenges facing a measure. Based on the survey results, a \$96 parcel tax measure enjoys natural support above the required two-thirds threshold for passage (73%). The results also suggest that a \$171 parcel tax may be feasible (66% support) *if* the District can do a solid job educating voters that this amount is what is needed to continue existing levels of service (i.e., no cuts).

What services do voters identify as priorities for funding?

One of the goals of this study was to identify voters’ preferences with respect to how the proceeds of a successful parcel tax should be spent. This information can be used to ensure that the ballot language and the expenditure plan for the proposed parcel tax is well-aligned with voters’ priorities.

Voters in Rancho Murieta clearly see a need for the services that could be funded by the parcel tax. In fact, all services tested were favored by more than seven-in-ten voters surveyed. That said, voters expressed the *greatest* interest in using parcel tax proceeds to deter major crimes including burglary and theft, continue providing security gate officers 24 hours per day, year round, to control community access and prevent trespassing, reduce vandalism, graffiti, and property damage, and reduce trespassing by non-residents.

How might a public information campaign affect support for the proposed measure?

As noted in the body of this report, individuals’ opinions about revenue measures are often not rigid, especially when the amount of information presented to the public on a measure has been limited. Thus, in addition to measuring current support for the measure, one of the goals of this study was to explore how the introduction of additional information about the measure may affect voters’ opinions about the parcel tax.

It is clear from the survey results that voters’ opinions about the proposed measure are somewhat sensitive to the nature—and amount—of information that they have about the measure. Information about the specific services and improvements that could be funded by the measure, as well as arguments in favor of the measure, were found by many voters to be compelling reasons to support the measure. However, voters were also sensitive to opposition arguments, which effectively reduced support for the measure by 2% when compared to the levels recorded at the Interim Ballot Test. Accordingly, one of the keys to building and sustaining support for the parcel tax measure will be the pres-

ence of an effective, well-organized public outreach effort, as well as a robust independent campaign that focuses on the need for the measure as well as the many benefits that it will bring.

How might changes to the economic or political climate alter support for the measure?

A survey is a snapshot in time—which means the results of this study and the conclusions noted above must be viewed in light of the *current* economic and political climates. On the one hand, this should provide some reassurances to the District that an appropriately packaged measure could be feasible. Even with concerns regarding the pandemic, inflation, and the trajectory of the economy, voters were generally supportive of the proposed parcel tax measure when priced in their comfort zone.

On the other hand, the months leading up to the November 2022 election are likely to be punctuated with significant events on the public health, economic, and political fronts. Exactly how these events unfold and may shape voters' opinions remains to be seen. Should the economy and/or political climate improve, support for the measure could increase. Conversely, negative economic and/or political developments (including devolving into a hyper-partisan environment), could dampen support for the measure below what was recorded in this study.

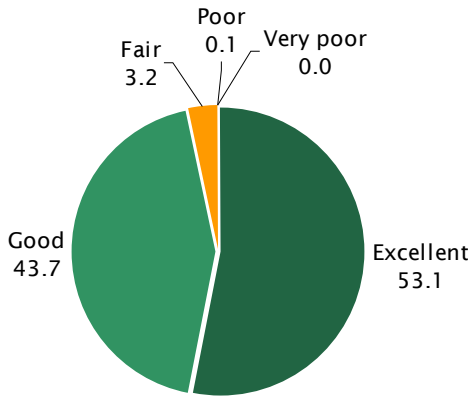
QUALITY OF LIFE & LOCAL ISSUES

The opening section of the survey was designed to gauge voters' opinions regarding the quality of life in Rancho Murieta, their ideas for how it can be improved, and identify the importance of local issues.

QUALITY OF LIFE At the outset of the interview, voters were asked to rate the quality of life in the Rancho Murieta using a five-point scale of excellent, good, fair, poor, or very poor. As shown in Figure 1 below, nearly all voters (97%) shared favorable opinions of the quality of life in Rancho Murieta, with 53% reporting it is excellent and 44% stating it is good. Approximately 3% of voters surveyed said the quality of life in the community is fair, whereas less than 1% used poor or very poor to describe the quality of life in Rancho Murieta.

Question 2 *How would you rate the overall quality of life in your community? Would you say it is excellent, good, fair, poor or very poor?*

FIGURE 1 QUALITY OF LIFE



Figures 2 and 3 show how ratings of the quality of life in the community varied according to length of residence, party affiliation, gender, home ownership status, and age. The most striking pattern in the tables is the *consistency* with which voters rated the quality of life in the community as either excellent or good, ranging from a low of 88% to a high of 99% across all subgroups.

FIGURE 2 QUALITY OF LIFE BY YEARS IN RANCHO MURIETA & PARTY

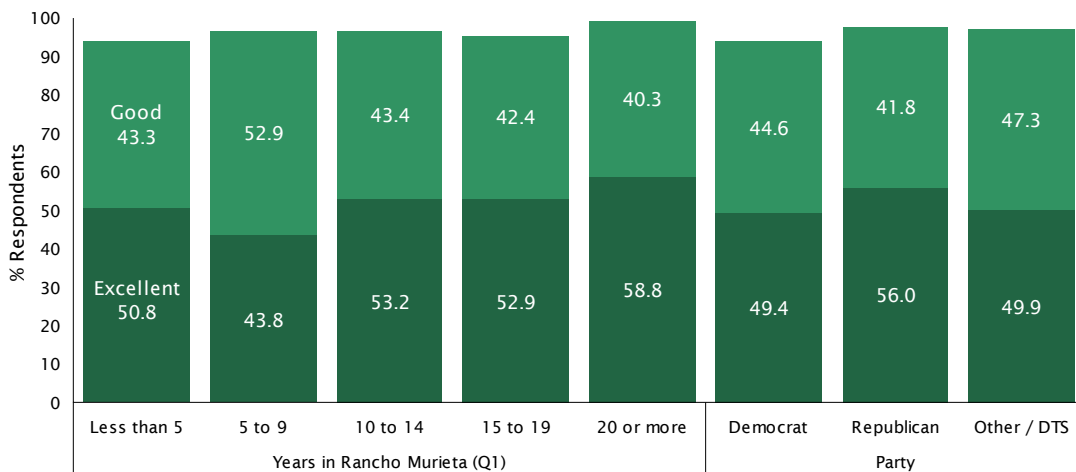
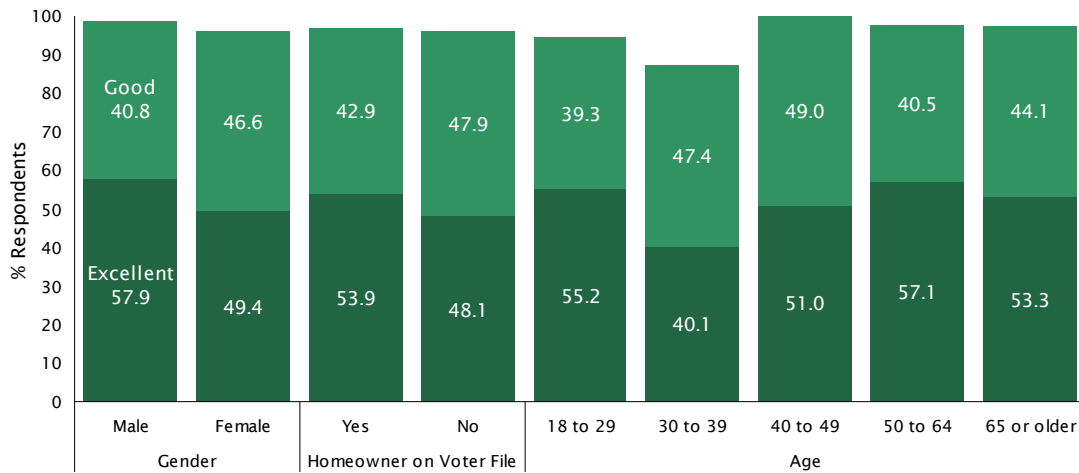


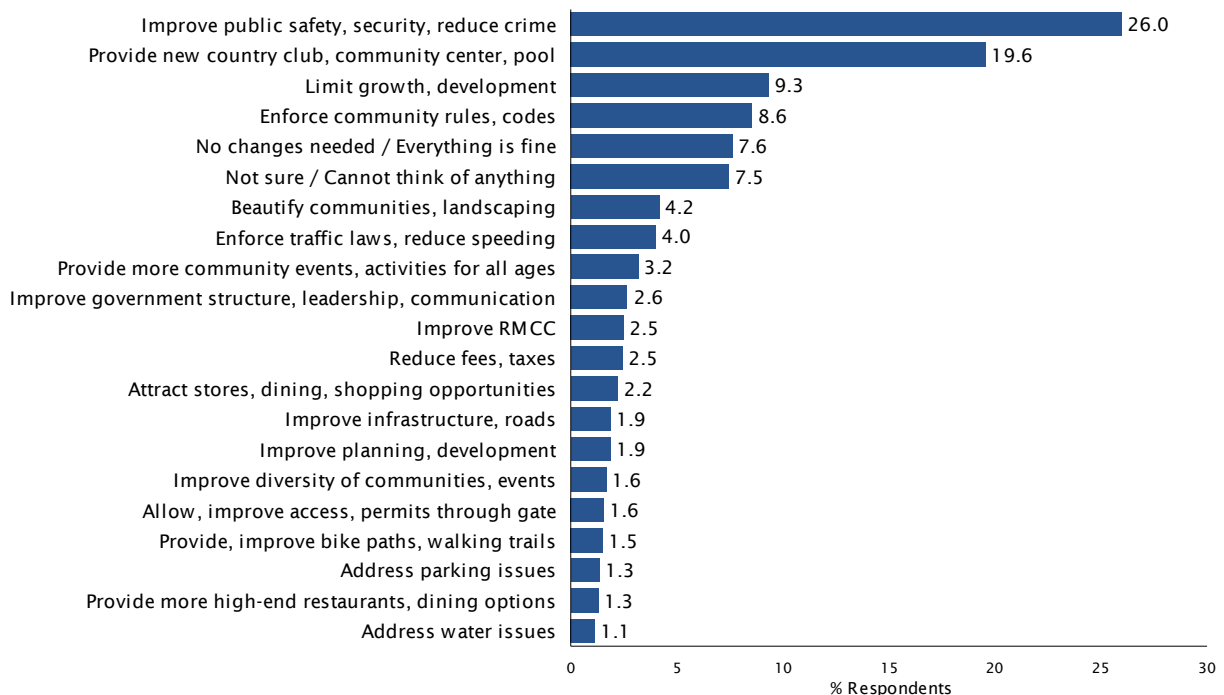
FIGURE 3 QUALITY OF LIFE BY GENDER & HOMEOWNER ON VOTER FILE & AGE



WHAT SHOULD BE CHANGED ABOUT RANCHO MURIETA? The next question in this series asked residents to identify what one change they would make to improve the quality of life in Rancho Murieta, now and in the future. Question 3 was presented in an open-ended manner, thereby allowing respondents to mention any change that came to mind without being prompted by—or restricted to—a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 4.

Question 3 *If you could change one thing to make Rancho Murieta a better place to live, what change would you like to see?*

FIGURE 4 CHANGES TO IMPROVE RANCHO MURIETA



Approximately 15% could not think of a change they desire or reported that no changes are needed/everything is fine, both of which are indicative of a respondent who does not perceive any pressing issues or problems in the community. Among specific changes desired, the most common were improving public safety and security/reducing crime (26%), providing a new country club/community center/pool (20%), limiting growth and development (9%), and enforcing community rules/codes (9%).

IMPORTANCE OF ISSUES Following the open-ended opportunity to identify needed changes (Question 3), Question 4 presented respondents with several issues facing residents in Rancho Murieta and asked them to rate the importance of each issue. Because the same response scale was used for each issue, the results provide insight into how important each issue is on a scale of importance *as well as* how each issue ranks in importance relative to the other issues tested. To avoid a systematic position bias, the order in which the issues were presented was randomized for each respondent.

Question 4 *Next, I'm going to read a list of issues facing your community and for each one, please tell me how important you feel the issue is to you, using a scale of extremely important, very important, somewhat important or not at all important.*

FIGURE 5 IMPORTANCE OF ISSUES

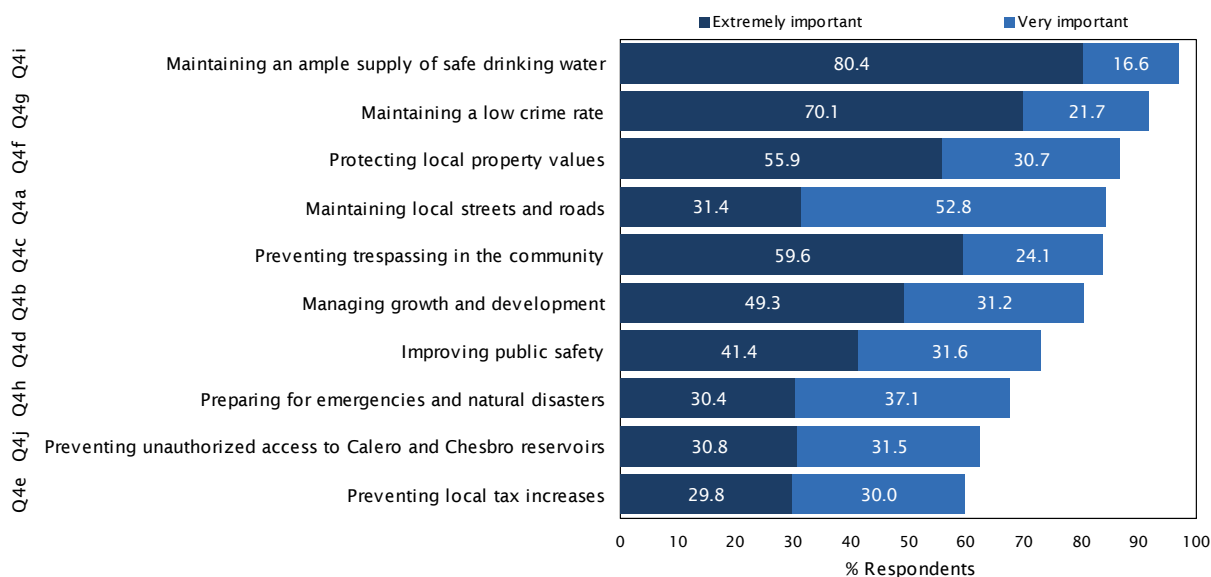


Figure 5 presents the issues tested, as well as the importance assigned to each by survey participants, sorted by order of importance.¹ Overall, maintaining an ample supply of safe drinking water received the highest percentage of respondents indicating that the issue was either extremely or very important (97%), followed by maintaining a low crime rate (92%), protecting local property values (87%), maintaining local streets and roads (84%), and preventing trespassing in the community (84%).

1. Issues were sorted by the percentage of respondents who indicated that the issue was either *extremely* important or *very* important.

Given the purpose of this study, it is instructive to note that preventing local tax increases (60%) was rated lower in importance than security-related items including maintaining a low crime rate (92%), preventing trespassing in the community (84%), and improving public safety (73%).

INITIAL BALLOT TEST

The primary research objective of this survey was to estimate voters' support for a measure that would establish a parcel tax of \$298 per year to prevent crime and better protect the lives and property of Rancho Murieta residents and businesses, provide additional patrols by Sheriff's deputies and security patrol staff, and continue gated security 24 hours per day, year round. To this end, Question 5 was designed to take an early assessment of voters' support for the proposed measure.

The motivation for placing Question 5 up-front in the survey is twofold. First, voter support for a measure can often depend on the amount of information they have about a measure. At this point in the survey, the respondent has not been provided information about the proposed measure beyond what is presented in the ballot language. This situation is analogous to a voter casting a ballot with limited knowledge about the measure, such as what might occur in the absence of an effective education campaign. Question 5, also known as the Initial Ballot Test, is thus a good measure of voter support for the proposed measure *as it is today*, on the natural. Because the Initial Ballot Test provides a gauge of 'natural' support for the measure, it also serves a second purpose in that it provides a useful baseline from which to judge the impact of various information items conveyed later in the survey on voter support for the measure.

Question 5 *Next year, voters in your community may be asked to vote on a local ballot measure. Let me read you a summary of the measure. In order to prevent crime and better protect the lives and property of Rancho Murieta residents and businesses; provide additional patrols by Sheriff's deputies and security patrol staff; and continue gated security 24 hours per day, year round; shall the Rancho Murieta Community Services District measure be approved levying \$298 annually per parcel, providing 800 thousand dollars annually until ended by voters, with all money staying local? If the election were held today, would you vote yes or no on this measure?*

FIGURE 6 INITIAL BALLOT TEST

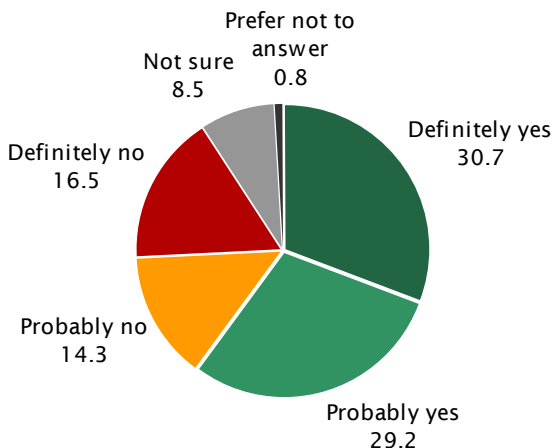


Figure 6 presents the results of the Initial Ballot Test among all likely November 2022 voters surveyed. Overall, 60% of respondents indicated they would support the measure at this stage in the survey, whereas 31% stated they would oppose the measure and 9% were unsure or unwilling to share their vote choice. The support level recorded at the Initial Ballot Test for a \$298 parcel tax measure was approximately seven percentage points below the two-thirds super-majority required for passage of a parcel tax under California law.

SUPPORT BY SUBGROUPS For the interested reader, Table 1 shows how support for the measure at the Initial Ballot Test varied by key demographic variables. The blue column (Approximate % of Voter Universe) indicates the percentage of the likely November 2022 electorate that each subgroup category comprises. Support for the proposed parcel tax measure at the Initial Ballot Test varied considerably by certain factors—most notably by age, registration date, and perceptions of the safety of the community. It is noteworthy, moreover, that support did *not* vary significantly by partisanship, which is unusual as Republican voters tend to be far less supportive of tax measures when compared to their counterparts.

TABLE 1 DEMOGRAPHIC BREAKDOWN OF SUPPORT AT INITIAL BALLOT TEST

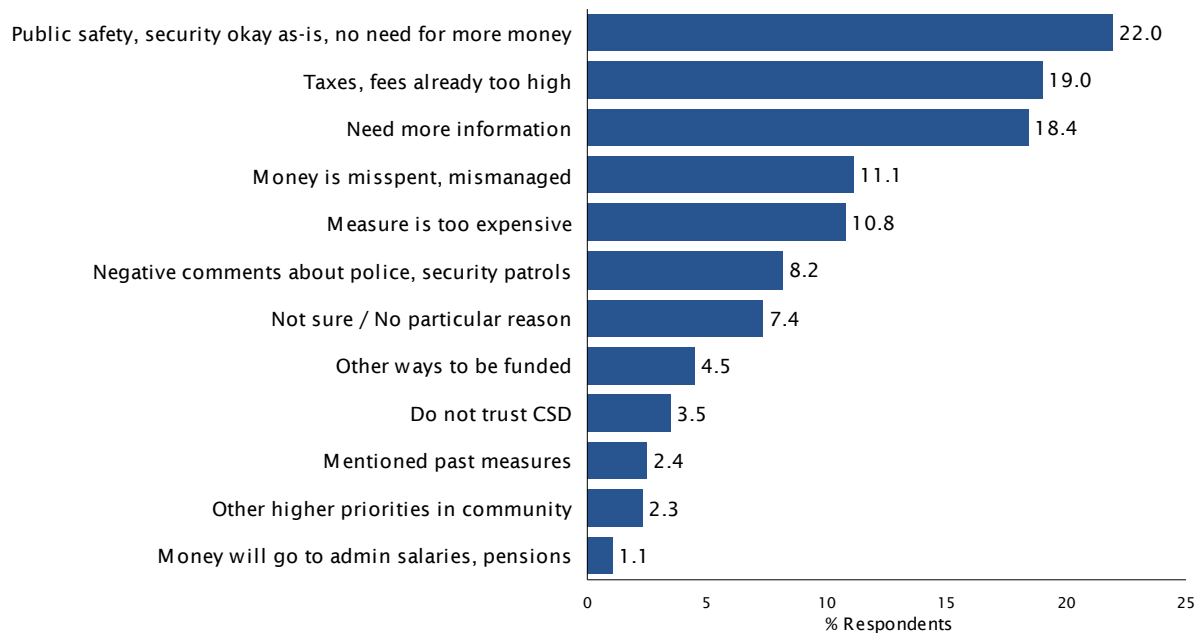
		Approximate % of Voter Universe	% Probably or Definitely Yes	% Not sure
Overall		100.0	59.9	8.5
Years in Rancho Murieta (Q1)	Less than 5	22.6	56.9	6.0
	5 to 9	15.1	72.6	7.8
	10 to 14	10.1	60.3	14.9
	15 to 19	17.2	54.6	8.5
	20 or more	35.0	58.7	8.6
Party	Democrat	24.9	61.9	8.3
	Republican	53.8	59.5	7.9
	Other / DTS	21.3	58.7	10.1
Age	18 to 29	7.6	22.4	11.9
	30 to 39	8.8	63.4	0.0
	40 to 49	13.2	59.7	10.1
	50 to 64	28.8	63.8	7.1
	65 or older	41.5	63.4	10.1
Registration Year	Since Nov '18	7.1	35.8	19.7
	Jun '12 to <Nov '18	18.1	58.1	1.2
	Jun '06 to <Jun '12	6.4	54.0	8.8
	Before Jun '06	68.4	63.5	9.2
Household Party Type	Single dem	10.4	71.4	2.9
	Dual dem	9.0	60.8	9.5
	Single rep	14.1	69.4	5.6
	Dual rep	27.6	55.3	7.6
	Other	12.0	52.3	10.5
	Mixed	26.9	58.3	11.8
Perceived Safety (Q16)	Safe	97.9	60.6	8.4
	Unsafe	2.2	38.2	14.8
Gender	Male	47.7	56.1	7.1
	Female	52.3	63.7	10.3
Homeowner on Voter File	Yes	85.0	60.4	9.0
	No	15.0	57.1	5.3
Likely to Vote by Mail	Yes	75.1	59.7	8.3
	No	24.9	60.5	9.1
Likely Jun 2022 Voter	Yes	77.6	62.7	8.5
	No	22.4	50.2	8.4
Likely Nov 2022 Voter	Yes, natural	95.0	60.5	8.0
	Yes, GOTV	5.0	48.4	16.7

REASONS FOR NOT SUPPORTING MEASURE Respondents who did not support the measure at Question 5 (or were unsure) were asked if there was a particular reason for their position. Question 6 was asked in an open-ended manner, allowing respondents to mention any reason that came to mind without being prompted by or restricted to a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 7.

Among specific reasons offered for not supporting the measure, a perception that safety and security are fine as is/there is no need for additional funding was the most common (22%), followed by concerns that taxes/fees are too high already (19%), and a need for more information (18%).

Question 6 *Is there a particular reason why you do not support or are unsure about the security measure I just described?*

FIGURE 7 REASONS FOR NOT SUPPORTING MEASURE



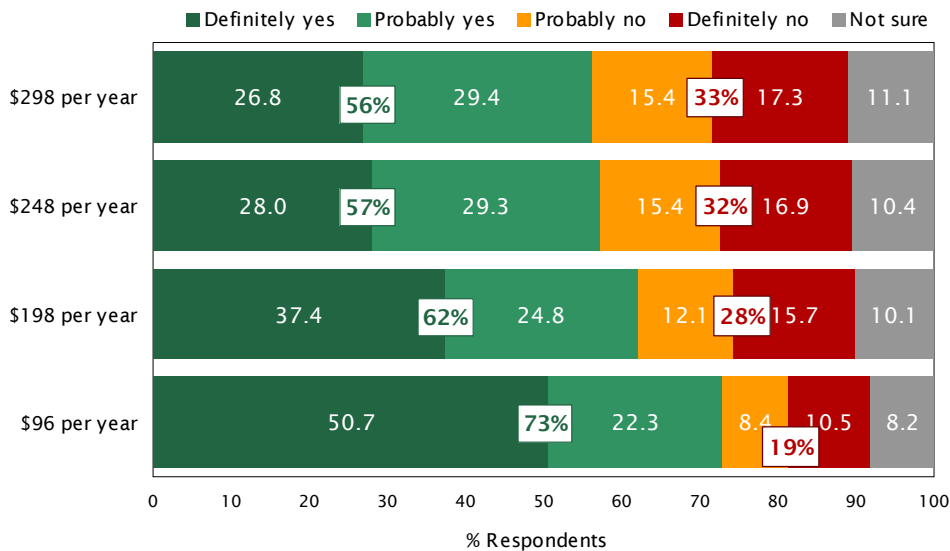
TAX THRESHOLD

Naturally, voter support for a revenue measure is often contingent on the cost of the measure. The higher the tax rate, all other things being equal, the less likely a voter is to support the measure. One of the goals of this study was thus to gauge the impact that changes in the tax rate can be expected to have on voter support for the proposed security measure.

Question 7 was designed to do just that. Respondents were first instructed that the measure would raise money through annual property taxes paid by residential and commercial property owners in the District, and that the amount to be charged was not yet finalized. They were then presented with the highest additional tax rate (\$298 per year per property) and asked if they would support the proposed measure at that rate. If a respondent did not answer 'definitely yes', they were asked whether they would support the measure at the next lowest tax rate. The four tax rates tested and the percentage of respondents who indicated they would vote in favor of the measure at each rate are shown in Figure 8.

Question 7 *The measure I just described would raise money through annual property taxes paid by residential and commercial property owners. However, the amount to be charged to each parcel has not been determined yet. If you knew that your household would pay an additional _____ per year, would you vote yes or no on the measure?*

FIGURE 8 TAX THRESHOLD



The most obvious pattern revealed in Figure 8 is that some voters are price sensitive when it comes to their support for the proposed parcel tax measure, especially when their attention is *focused* on the tax rate as it is in Question 7. At the highest tax rate tested (\$298 per year), 56% of those surveyed indicated that they would vote in favor of the measure. Reducing the tax rate resulted in increased support for the measure, with 73% of those surveyed indicating they would support the proposed measure at \$98 per year.

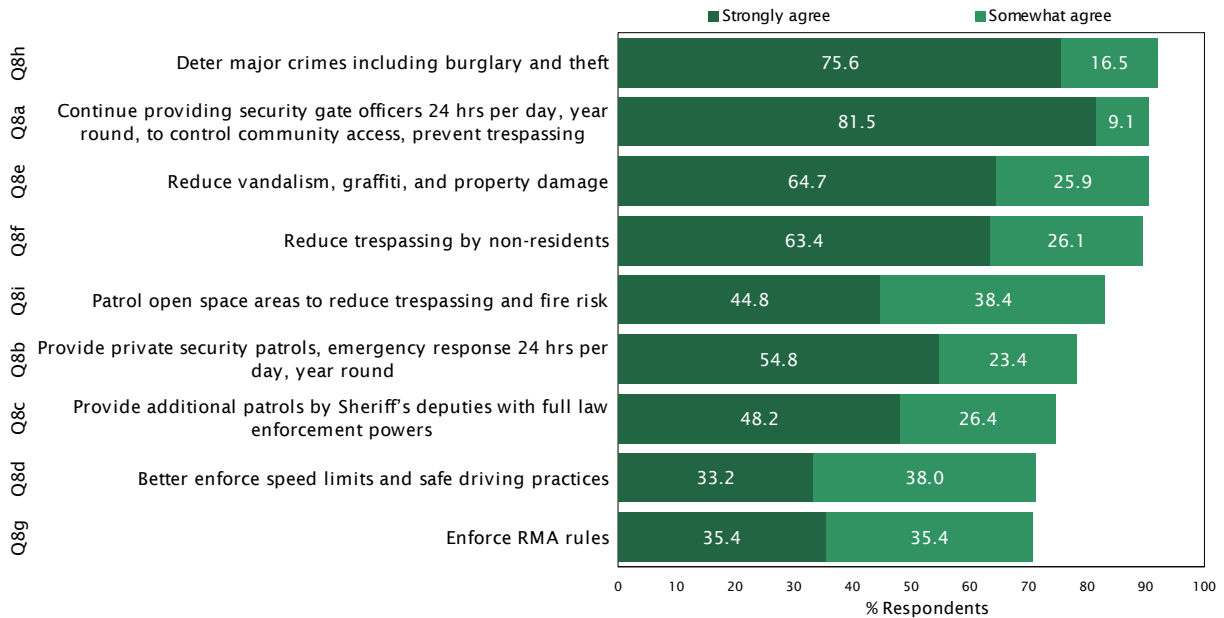
SERVICES & IMPROVEMENTS

The ballot language presented in Question 5 indicated that the proposed parcel tax measure would be used to prevent crime and better protect the lives and property of Rancho Murieta residents and businesses, provide additional patrols by Sheriff's deputies and security patrol staff, and continue gated security 24 hours per day, year round. The purpose of Question 8 was to provide respondents with the full range of programs and services that may be funded by the proposed measure, and to identify which of these improvements voters most favored funding with parcel tax proceeds.

After reading each item that may be funded by the measure, respondents were asked if they would favor or oppose spending some of the money on that particular service assuming that the measure passes. Descriptions of the services tested, as well as voters' responses, are shown in Figure 9 below.

Question 8 *The measure we've been discussing would provide funding for a variety of security services and improvements. If the measure passes, would you favor or oppose using some of the money to: _____, or do you not have an opinion?*

FIGURE 9 SERVICES & IMPROVEMENTS



Although all potential uses of parcel tax proceeds tested in Question 8 were favored by at least seven-in-ten voters, the services that resonated with the highest percentage of respondents were deterring major crimes including burglary and theft (92% strongly or somewhat favor), continuing to provide security gate officers 24 hours per day, year round, to control community access and prevent trespassing (91%), reducing vandalism, graffiti, and property damage (91%), and reducing trespassing by non-residents (90%).

SERVICE RATINGS BY INITIAL SUPPORT Table 2 presents the top five programs and services (showing the percentage of respondents who *strongly* favor each) by position at the Initial Ballot Test. Not surprisingly, individuals who initially opposed the measure were generally less likely to favor spending money on a given program or service when compared to supporters. Nevertheless, initial supporters, opponents and the undecided did agree on four of the five top priorities for funding.

TABLE 2 TOP SERVICES & IMPROVEMENTS BY POSITION AT INITIAL BALLOT TEST

Position at Initial Ballot Test (Q5)	Item	Service or Improvement Summary	% Strongly Favor
Probably or Definitely Yes (n = 403)	Q8a	Continue providing security gate officers 24 hrs per day, year round, to control community access, prevent trespassing	93
	Q8h	Deter major crimes including burglary and theft	88
	Q8e	Reduce vandalism, graffiti, and property damage	79
	Q8f	Reduce trespassing by non-residents	73
	Q8b	Provide private security patrols, emergency response 24 hrs per day, year round	68
Probably or Definitely No (n = 207)	Q8a	Continue providing security gate officers 24 hrs per day, year round, to control community access, prevent trespassing	60
	Q8h	Deter major crimes including burglary and theft	52
	Q8f	Reduce trespassing by non-residents	45
	Q8e	Reduce vandalism, graffiti, and property damage	40
	Q8b	Provide private security patrols, emergency response 24 hrs per day, year round	33
Not Sure (n = 57)	Q8a	Continue providing security gate officers 24 hrs per day, year round, to control community access, prevent trespassing	80
	Q8h	Deter major crimes including burglary and theft	73
	Q8f	Reduce trespassing by non-residents	61
	Q8e	Reduce vandalism, graffiti, and property damage	58
	Q8c	Provide additional patrols by Sheriff's deputies with full law enforcement powers	43

POSITIVE ARGUMENTS

If the Board chooses to place a parcel tax measure on an upcoming ballot, voters will be exposed to various arguments about the measure in the ensuing months. Proponents of the parcel tax will present arguments to try to persuade voters to support a measure, just as opponents may present arguments to achieve the opposite goal. For this study to be a reliable gauge of voter support for the proposed parcel tax measure, it is important that the survey simulate the type of discussion and debate that will occur prior to the vote taking place and identify how this information ultimately shapes voters' opinions about the measure.

The objective of Question 9 was thus to present respondents with arguments in favor of the proposed measure and identify whether they felt the arguments were convincing reasons to support it. Arguments in opposition to the measure were also presented and will be discussed later in this report (see *Negative Arguments* on page 24). Within each series, specific arguments were administered in random order to avoid a systematic position bias.

Question 9 *What I'd like to do now is tell you what some people are saying about the measure we've been discussing. Supporters of the measure say: _____. Do you think this is a very convincing, somewhat convincing, or not at all convincing reason to SUPPORT the measure?*

FIGURE 10 POSITIVE ARGUMENTS

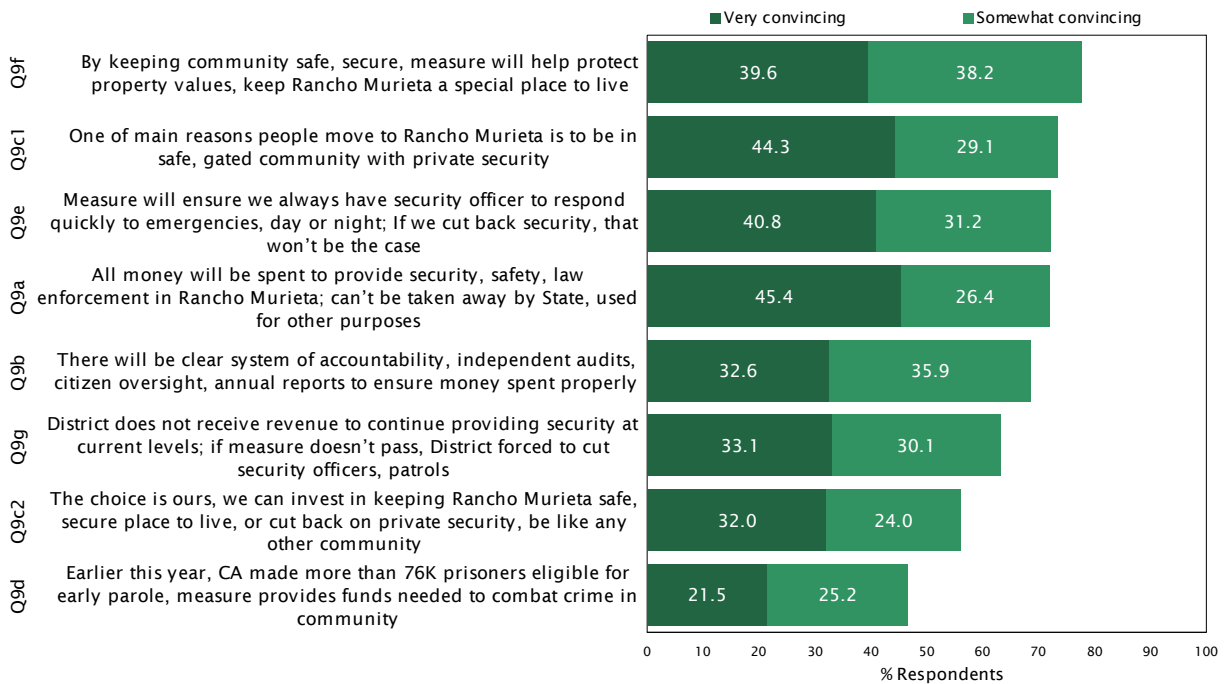


Figure 10 presents the truncated positive arguments tested, as well as voters' reactions to the arguments. The arguments are sorted from most convincing to least convincing based on the percentage of respondents who indicated that the argument was either a 'very convincing' or 'somewhat convincing' reason to support the measure. Using this methodology, the most compelling positive arguments were: *By keeping our community safe and secure, this measure will help protect our property values and keep Rancho Murieta a special place to live* (78% very or

somewhat convincing), followed by *One of the main reasons people move to Rancho Murieta is to be in a safe, gated community with private security. If we want to keep our community safe, we need to support this measure (73%), This measure will ensure that we always have a security officer available to respond quickly to emergencies - day or night. If we cut back on security, that won't be the case (72%), and All money raised by this measure will be spent to provide security, safety, and law enforcement services in Rancho Murieta. The money can't be taken away by the State or used for other purposes (72%)*.

POSITIVE ARGUMENTS BY INITIAL SUPPORT Table 3 on the next page lists the top five most convincing positive arguments (showing the percentage of respondents who cited it as *very convincing*) according to respondents' vote choice at the Initial Ballot Test. The most striking pattern in the table is that the positive arguments resonated with a much higher percentage of voters who were initially inclined to support the measure when compared to voters who initially opposed the measure or were unsure. Nevertheless, four arguments were ranked among the top five most compelling by all three groups.

TABLE 3 TOP POSITIVE ARGUMENTS BY POSITION AT INITIAL BALLOT TEST

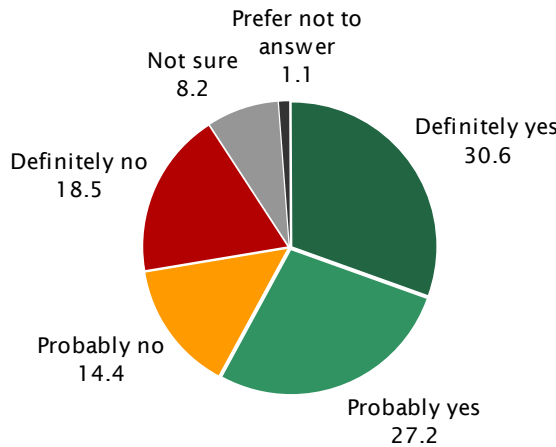
Position at Initial Ballot Test (Q5)	Item	Positive Argument Summary	% Very Convincing
Probably or Definitely Yes (n = 403)	Q9c1	One of main reasons people move to Rancho Murieta is to be in safe, gated community with private security	65
	Q9a	All money will be spent to provide security, safety, law enforcement in Rancho Murieta; can't be taken away by State, used for other purposes	64
	Q9e	Measure will ensure we always have security officer to respond quickly to emergencies, day or night; If we cut back security, that won't be the case	56
	Q9f	By keeping community safe, secure, measure will help protect property values, keep Rancho Murieta a special place to live	56
	Q9g	District does not receive revenue to continue providing security at current levels; if measure doesn't pass, District forced to cut back on security officers, patrols	50
Probably or Definitely No (n = 207)	Q9c1	One of main reasons people move to Rancho Murieta is to be in safe, gated community with private security	16
	Q9e	Measure will ensure we always have security officer to respond quickly to emergencies, day or night; If we cut back security, that won't be the case	15
	Q9a	All money will be spent to provide security, safety, law enforcement in Rancho Murieta; can't be taken away by State, used for other purposes	14
	Q9f	By keeping community safe, secure, measure will help protect property values, keep Rancho Murieta a special place to live	14
	Q9b	There will be clear system of accountability, independent audits, citizen oversight, annual reports to ensure money spent properly	12
Not Sure (n = 57)	Q9e	Measure will ensure we always have security officer to respond quickly to emergencies, day or night; If we cut back security, that won't be the case	26
	Q9a	All money will be spent to provide security, safety, law enforcement in Rancho Murieta; can't be taken away by State, used for other purposes	24
	Q9c1	One of main reasons people move to Rancho Murieta is to be in safe, gated community with private security	23
	Q9b	There will be clear system of accountability, independent audits, citizen oversight, annual reports to ensure money spent properly	21
	Q9f	By keeping community safe, secure, measure will help protect property values, keep Rancho Murieta a special place to live	21

INTERIM BALLOT TEST

After informing respondents about potential tax rates associated with the parcel tax, services and programs that could be funded, as well as exposing them to positive arguments they may encounter about the measure, the survey again presented voters with the ballot language used previously to gauge how their support for the proposed \$298 parcel tax may have changed. As shown in Figure 11, overall support for the measure among likely November 2022 voters decreased slightly to 58%, with 31% of voters indicating that they would *definitely* vote yes on the measure. Approximately 33% of respondents opposed the measure at this point in the survey, and an additional 9% were unsure or unwilling to state their vote choice.

Question 10 *Sometimes people change their mind about a measure once they have more information about it. Now that you have heard a bit more about the measure, let me read you a summary of it again. In order to prevent crime and better protect the lives and property of Rancho Murieta residents and businesses; provide additional patrols by Sheriff's deputies and security patrol staff; and continue gated security 24 hours per day, year round; shall the Rancho Murieta Community Services District measure be approved levying \$298 annually per parcel, providing 800 thousand dollars annually until ended by voters, with all money staying local? If the election were held today, would you vote yes or no on this measure?*

FIGURE 11 INTERIM BALLOT TEST



SUPPORT BY SUBGROUPS Table 4 on the next page shows how support for the measure at this point in the survey varied by key demographic subgroups, as well as the percentage change in subgroup support when compared with the Initial Ballot Test. Positive differences appear in green, whereas negative differences appear in red. As shown in the table, support for the parcel tax increased or decreased by modest amounts (5 percentage points or less) between the Initial and Interim Ballot Test for the majority of voter subgroups. The largest gains in support for the measure were found among voters who were under 30 years of age (+8%), those who had registered to vote in the community since November 2018 (+9%), and those who aren't natural November '22 voters but could participate through a get out the vote (GOTV) effort (+9%).

TABLE 4 DEMOGRAPHIC BREAKDOWN OF SUPPORT AT INTERIM BALLOT TEST

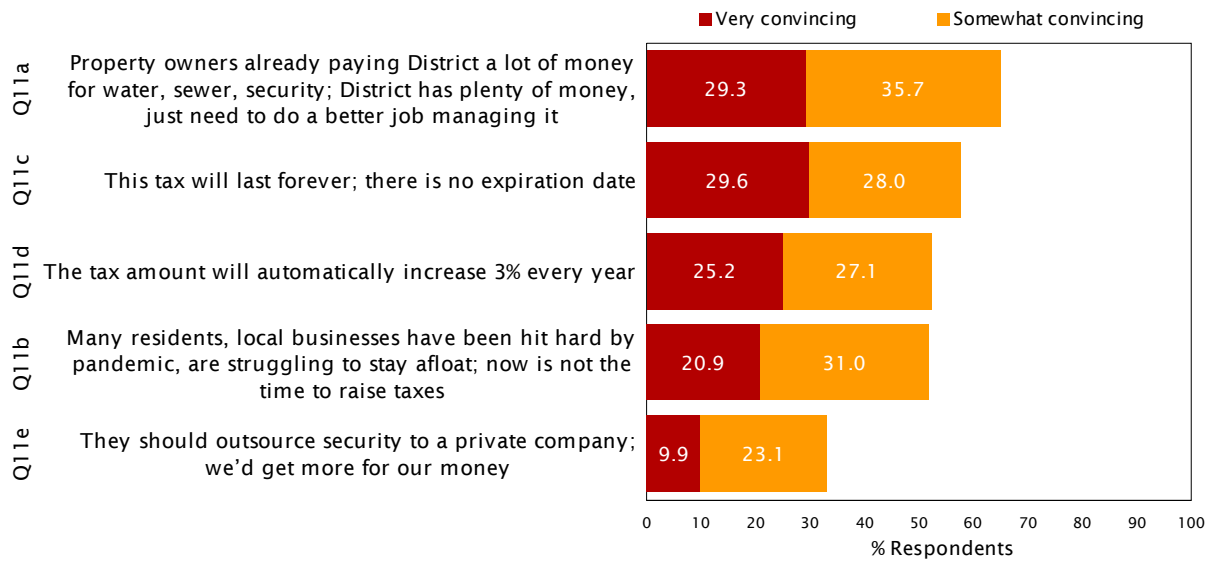
		Approximate % of Voter Universe	% Probably or Definitely Yes	Change From Initial Ballot Test (Q5)
Overall		100.0	57.8	-2.1
Years in Rancho Murieta (Q1)	Less than 5	22.6	55.3	-1.6
	5 to 9	15.1	70.2	-2.4
	10 to 14	10.1	56.6	-3.7
	15 to 19	17.2	53.5	-1.1
	20 or more	35.0	56.8	-1.9
Party	Democrat	24.9	60.5	-1.5
	Republican	53.8	56.1	-3.4
	Other / DTS	21.3	59.0	+0.3
Age	18 to 29	7.6	29.8	+7.5
	30 to 39	8.8	55.8	-7.6
	40 to 49	13.2	59.3	-0.4
	50 to 64	28.8	61.2	-2.6
	65 or older	41.5	60.5	-2.9
Registration Year	Since Nov '18	7.1	44.5	+8.7
	Jun '12 to <Nov '18	18.1	50.1	-8.1
	Jun '06 to <Jun '12	6.4	43.0	-11.1
	Before Jun '06	68.4	62.7	-0.8
Household Party Type	Single dem	10.4	72.1	+0.6
	Dual dem	9.0	57.0	-3.9
	Single rep	14.1	63.7	-5.7
	Dual rep	27.6	51.9	-3.4
	Other	12.0	56.1	+3.8
	Mixed	26.9	56.4	-1.9
Perceived Safety (Q16)	Safe	97.9	58.3	-2.3
	Unsafe	2.2	43.3	+5.1
Gender	Male	47.7	53.7	-2.4
	Female	52.3	62.9	-0.8
Homeowner on Voter File	Yes	85.0	58.8	-1.7
	No	15.0	52.5	-4.6
Likely to Vote by Mail	Yes	75.1	57.9	-1.8
	No	24.9	57.6	-2.9
Likely Jun 2022 Voter	Yes	77.6	59.5	-3.3
	No	22.4	52.1	+1.9
Likely Nov 2022 Voter	Yes, natural	95.0	57.9	-2.7
	Yes, GOTV	5.0	57.2	+8.7

NEGATIVE ARGUMENTS

Whereas Question 9 presented respondents with arguments in favor of the measure, Question 11 presented respondents with arguments designed to elicit opposition to the measure. In the case of Question 11, however, respondents were asked whether they felt that the argument was a very convincing, somewhat convincing, or not at all convincing reason to *oppose* the measure. The arguments tested, as well as voters’ opinions about the arguments, are presented in Figure 12.

Question 11 *Next, let me tell you what opponents of the measure are saying. Opponents of the measure say: _____. Do you think this is a very convincing, somewhat convincing, or not at all convincing reason to OPPOSE the measure?*

FIGURE 12 NEGATIVE ARGUMENTS



Among the negative arguments tested, the most compelling were: *Property owners are already paying the District a lot of money for water, sewer, and security. The District has plenty of money, they just need to do a better job managing it* (65% very or somewhat convincing), *This tax will last forever. There is no expiration date* (58%), and *The tax amount will automatically increase 3% every year* (52%).

NEGATIVE ARGUMENTS BY INITIAL SUPPORT Table 5 on the next page ranks the negative arguments (showing the percentage of respondents who cited each as very convincing) according to respondents’ vote choice at the Initial Ballot Test.

TABLE 5 NEGATIVE ARGUMENTS BY POSITION AT INITIAL BALLOT TEST

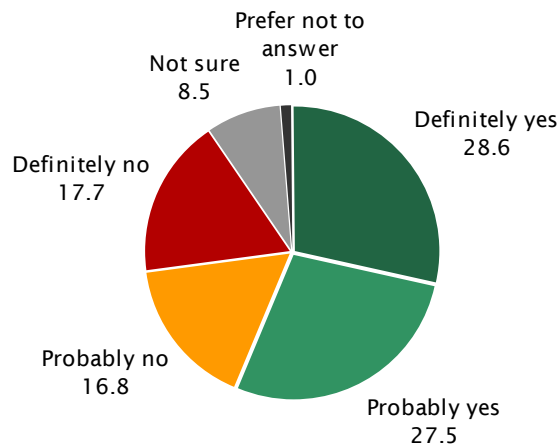
Position at Initial Ballot Test (Q5)	Item	Negative Argument Summary	% Very Convincing
Probably or Definitely Yes (n = 403)	Q11c	This tax will last forever; there is no expiration date	18
	Q11a	Property owners already paying District a lot of money for water, sewer, security; District has plenty of money, just need to do a better job managing it	15
	Q11d	The tax amount will automatically increase 3% every year	15
	Q11b	Many residents, local businesses have been hit hard by pandemic, are struggling to stay afloat; now is not the time to raise taxes	8
	Q11e	They should outsource security to a private company; we'd get more for our money	7
Probably or Definitely No (n = 207)	Q11a	Property owners already paying District a lot of money for water, sewer, security; District has plenty of money, just need to do a better job managing it	52
	Q11c	This tax will last forever; there is no expiration date	49
	Q11b	Many residents, local businesses have been hit hard by pandemic, are struggling to stay afloat; now is not the time to raise taxes	46
	Q11d	The tax amount will automatically increase 3% every year	42
	Q11e	They should outsource security to a private company; we'd get more for our money	15
Not Sure (n = 57)	Q11c	This tax will last forever; there is no expiration date	42
	Q11d	The tax amount will automatically increase 3% every year	41
	Q11a	Property owners already paying District a lot of money for water, sewer, security; District has plenty of money, just need to do a better job managing it	41
	Q11b	Many residents, local businesses have been hit hard by pandemic, are struggling to stay afloat; now is not the time to raise taxes	25
	Q11e	They should outsource security to a private company; we'd get more for our money	11

FINAL BALLOT TEST

Voters' opinions about ballot measures are often not rigid, especially when the amount of information presented to the public on a measure has been limited. An important goal of the survey was thus to gauge how voters' opinions about the proposed measure may be affected by the information they could encounter during the course of an election cycle. After providing respondents with the wording of the proposed measure, potential tax rates, programs and services that could be funded, and arguments in favor of and against the proposal, the survey again asked voters whether they would vote 'yes' or 'no' on the proposed parcel tax measure.

Question 12 *Now that you have heard a bit more about the measure, let me read you a summary of it one more time. In order to prevent crime and better protect the lives and property of Rancho Murieta residents and businesses; provide additional patrols by Sheriff's deputies and security patrol staff; and continue gated security 24 hours per day, year round; shall the Rancho Murieta Community Services District measure be approved levying \$298 annually per parcel, providing 800 thousand dollars annually until ended by voters, with all money staying local? If the election were held today, would you vote yes or no on this measure?*

FIGURE 13 FINAL BALLOT TEST



At this point in the survey, support for the \$298 parcel tax measure was found among 56% of likely November 2022 voters surveyed, with 29% indicating they would *definitely* support the measure. Approximately 35% of respondents opposed the measure at the Final Ballot Test, and 10% were unsure or unwilling to state their vote choice.



CHANGE IN SUPPORT

Table 6 provides a closer look at how support for the proposed measure changed over the course of the interview by calculating the difference in support between the Initial, Interim, and Final Ballot Tests within various subgroups of voters. The percentage of support for the measure at the Final Ballot Test is shown in the column with the heading *% Probably or Definitely Yes*. The columns to the right show the difference between the Final and the Initial, and the Final and Interim Ballot Tests. Positive differences appear in green, negative differences appear in red.

TABLE 6 DEMOGRAPHIC BREAKDOWN OF SUPPORT AT FINAL BALLOT TEST

		Approximate % of Voter Universe	% Probably or Definitely Yes	Change From Initial Ballot Test (Q5)	Change From Interim Ballot Test (Q10)
Overall		100.0	56.0	-3.9	-1.8
Years in Rancho Murieta (Q1)	Less than 5	22.6	54.5	-2.5	-0.8
	5 to 9	15.1	69.5	-3.1	-0.7
	10 to 14	10.1	52.8	-7.5	-3.8
	15 to 19	17.2	51.3	-3.3	-2.2
	20 or more	35.0	54.7	-4.0	-2.1
Party	Democrat	24.9	59.3	-2.6	-1.1
	Republican	53.8	55.1	-4.4	-1.1
	Other / DTS	21.3	54.6	-4.1	-4.5
Age	18 to 29	7.6	25.9	+3.5	-3.9
	30 to 39	8.8	54.4	-9.0	-1.4
	40 to 49	13.2	57.7	-2.0	-1.6
	50 to 64	28.8	58.8	-5.0	-2.4
	65 or older	41.5	59.4	-4.0	-1.1
Registration Year	Since Nov '18	7.1	38.9	+3.1	-5.6
	Jun '12 to <Nov '18	18.1	49.1	-9.0	-1.0
	Jun '06 to <Jun '12	6.4	43.0	-11.1	+0.0
	Before Jun '06	68.4	60.9	-2.6	-1.8
Household Party Type	Single dem	10.4	70.1	-1.3	-1.9
	Dual dem	9.0	58.2	-2.6	+1.2
	Single rep	14.1	63.4	-6.1	-0.3
	Dual rep	27.6	51.3	-4.0	-0.6
	Other	12.0	51.1	-1.2	-5.0
	Mixed	26.9	53.0	-5.3	-3.4
Perceived Safety (Q16)	Safe	97.9	56.4	-4.1	-1.8
	Unsafe	2.2	43.3	+5.1	-0.0
Gender	Male	47.7	52.4	-3.7	-1.3
	Female	52.3	60.5	-3.2	-2.4
Homeowner on Voter File	Yes	85.0	57.0	-3.4	-1.7
	No	15.0	50.3	-6.8	-2.2
Likely to Vote by Mail	Yes	75.1	56.7	-3.1	-1.3
	No	24.9	54.1	-6.4	-3.5
Likely Jun 2022 Voter	Yes	77.6	58.1	-4.6	-1.3
	No	22.4	48.7	-1.4	-3.4
Likely Nov 2022 Voter	Yes, natural	95.0	56.1	-4.4	-1.7
	Yes, GOTV	5.0	54.2	+5.8	-2.9

Voter subgroups generally responded to the negative arguments with a reduction in their support for the measure when compared with levels recorded at the Interim Ballot Test. The general trend over the course of the entire survey (Initial to Final Ballot Test) was also one of modestly declining support, averaging approximately -4 percentage points overall.

Whereas Table 6 displays change in support for the measure over the course of the interview at the group level, Table 7 presents individual-level changes that occurred between the Initial and Final Ballot Tests for the measure. On the left side of the table is shown each of the response options to the Initial Ballot Test and the percentage of respondents in each group. The cells in the body of the table depict movement within each response group (row) based on the information provided throughout the course of the survey as recorded by the Final Ballot Test. For example, in the first row we see that of the 30.7% of respondents who indicated they would definitely support the measure at the Initial Ballot Test, 25.9% indicated they would definitely support the measure at the Final Ballot Test. Approximately 3.8% moved to the probably support group, 0.7% moved to the probably oppose group, 0.0% moved to the definitely oppose group, and 0.3% stated they were now unsure of their vote choice.

To ease interpretation of the table, the cells are color coded. Red shaded cells indicate declining support, green shaded cells indicate increasing support, whereas white cells indicate no movement. Moreover, within the cells, a white font indicates a fundamental change in the vote: from yes to no, no to yes, or not sure to either yes or no.

TABLE 7 MOVEMENT BETWEEN INITIAL & FINAL BALLOT TEST

Initial Ballot Test (Q5)		Final Ballot Test (Q12)				
		Definitely support	Probably support	Probably oppose	Definitely oppose	Not sure
Definitely support	30.7%	25.9%	3.8%	0.7%	0.0%	0.3%
Probably support	29.2%	2.3%	22.3%	2.1%	0.3%	2.3%
Probably oppose	14.3%	0.0%	0.3%	10.4%	3.2%	0.5%
Definitely oppose	16.5%	0.1%	0.4%	2.0%	13.7%	0.3%
Not sure	9.3%	0.2%	0.6%	1.7%	0.6%	6.2%

As one might expect, the information conveyed in the survey had the greatest impact on individuals who either weren't sure about how they would vote at the Initial Ballot Test or were tentative in their vote choice (probably yes or probably no). Moreover, Table 7 makes clear that although the information presented in the survey did impact some voters, it did not do so in a consistent manner for all respondents. Some voters found the information conveyed during the course of the interview to be a reason to become more supportive of the measure, whereas a slightly larger percentage found the same information reason to be less supportive. Despite 10% of respondents making a *fundamental*² shift in their opinion regarding the measure over the course of the interview, the net impact is that support for the measure at the Final Ballot Test (56%) was just four percentage points lower than support at the Initial Ballot Test (60%).

2. This is, they changed from a position of support, opposition, or undecided at the Initial Ballot Test to a different position at the Final Ballot Test.

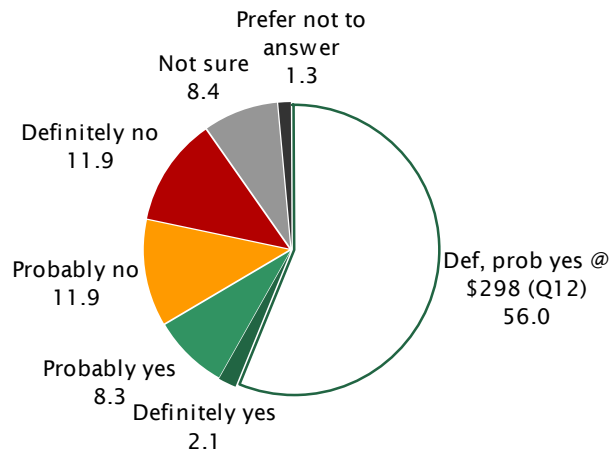
FINAL BALLOT TEST AT LOWER RATE

The ballot language tested throughout the survey indicated that the proposed security measure would increase property taxes by \$298 per year. Voters who did not support the proposed measure at the Final Ballot Test (Question 12) were subsequently asked if they would support the measure if the rate were set at a lower amount (\$171 per year), which is the amount needed to continue providing the current levels of security in the community and avoid having to make deep cuts to security patrols.

As shown in Figure 14, lowering the parcel tax to \$171 per year in the context of continuing existing levels of service generated approximately 10% additional support for the measure, bringing total support to 66%. It should be noted, however, that most of the additional support was 'soft' (probably yes).

Question 13 *What if the tax rate were set at a lower amount—\$171 per year? This is the amount needed to continue providing the current levels of security in the community and avoid having to make deep cuts to security patrols. Would you vote yes or no on the measure at this rate to maintain the current levels of security services?*

FIGURE 14 FINAL BALLOT TEST @ 171 PER YEAR



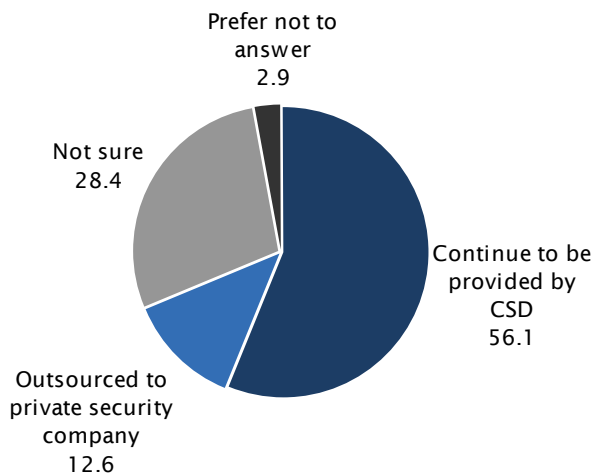
RELATED ATTITUDES

The final substantive questions of the survey addressed the topics of privatizing security in Rancho Murieta, perceived safety of the community, and trends in safety.

PRIVATIZING SECURITY Security services in Rancho Murieta are provided directly by the Rancho Murieta Community Services District, which is a public agency. After providing this background information, Question 14 asked respondents whether they felt security services should continue to be provided by the District, or outsourced to a private security company.

Question 14 *Security services are provided directly by the Rancho Murieta Community Services District, which is a public agency. Some have suggested that security should be outsourced to a private company. In general, which do you prefer - that security continue to be provided by the Community Service District, or that it be outsourced to a private security company?*

FIGURE 15 SECURITY SERVICE PREFERENCE



A majority of respondents (56%) preferred that security services continue to be provided by the District, whereas 13% preferred that they be outsourced to a private company. The remaining respondents were either unsure (28%) or preferred to not answer the question (3%). As shown in figures 16 and 17, continuing District-provided security services was the dominant choice among all subgroups.

FIGURE 16 SECURITY SERVICE PREFERENCE BY YEARS IN RANCHO MURIETA & POSITION AT INITIAL BALLOT TEST

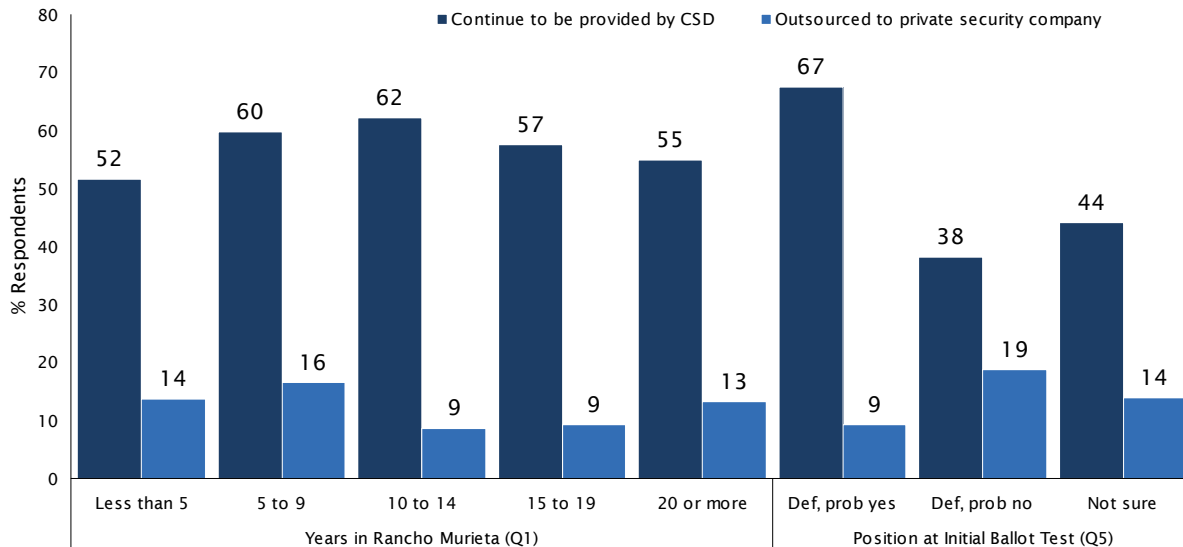
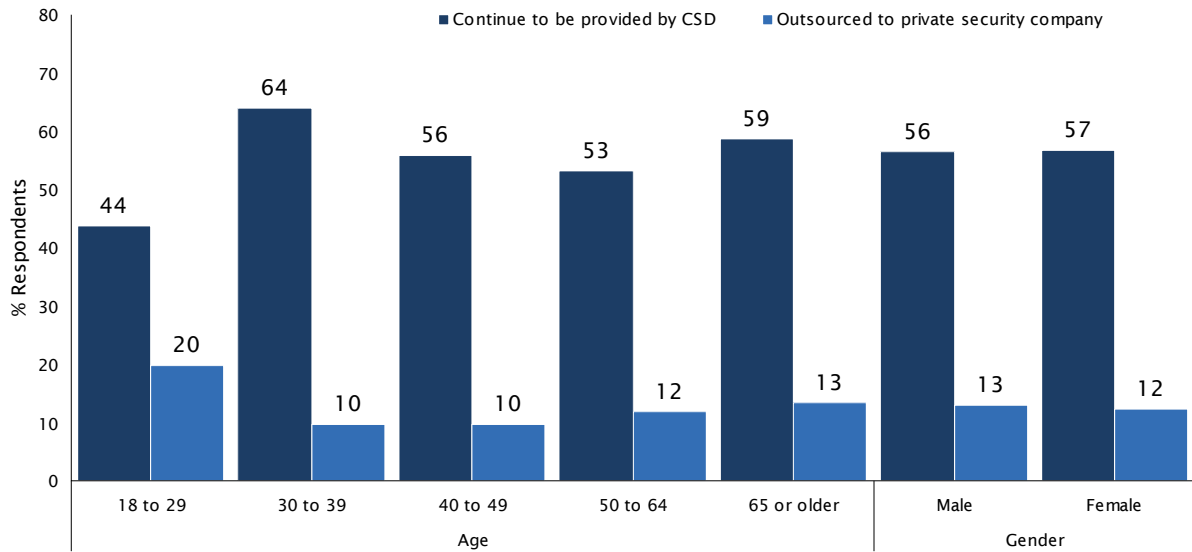


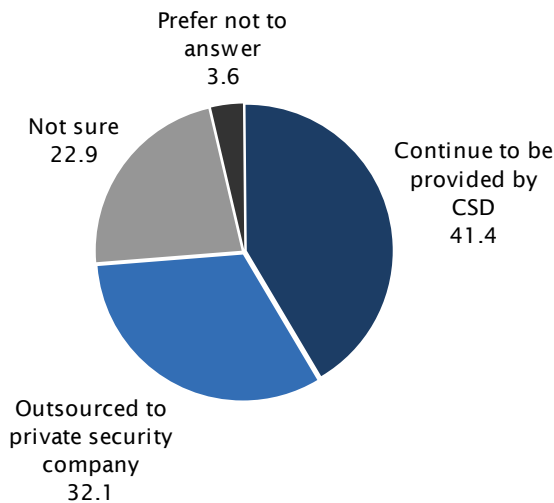
FIGURE 17 SECURITY SERVICE PREFERENCE BY AGE & GENDER



Having capture respondents' initial preferences, Question 15 introduced the notion that privatizing security would result in an estimated savings of 20% in the costs of providing security services (see Figure 18). Knowing this, Rancho Murieta residents still tended to prefer that security services be provided by the District (41%) rather than outsourced to a private security company (32%). Approximately 27% continued to be unsure (23%) or unwilling to answer the question (4%).

Question 15 *Outsourcing to a private security company would result in an estimated savings of 20% in the costs of providing services. Knowing this, which do you prefer - that security continue to be provided by the Community Service District, or that it be outsourced to a private security company?*

FIGURE 18 SECURITY SERVICE PREFERENCE WITH 20% SAVINGS INFO



PERCEIVED SAFETY All respondents were next asked to rate how safe Rancho Murieta is as a place to live (Question 16), and whether they perceive a trend in community safety over the past five years. As shown in Figure 19, nearly all respondents viewed the community as either very safe (65%) or somewhat safe (33%), with just 2% indicating it is somewhat unsafe. It is striking that more than nine-in-ten respondents in every subgroup rated Rancho Murieta as a safe place to live (see figures 20 & 21).

Question 16 Overall, how safe is Rancho Murieta as a place to live? Would you say it is very safe, somewhat safe, somewhat unsafe, or very unsafe?

FIGURE 19 PERCEIVED SAFETY

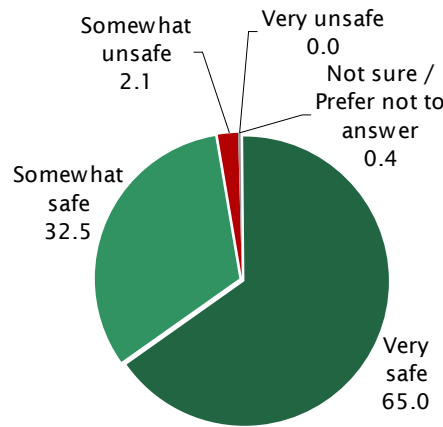


FIGURE 20 PERCEIVED SAFETY BY YEARS IN RANCHO MURIETA & POSITION AT INITIAL BALLOT TEST

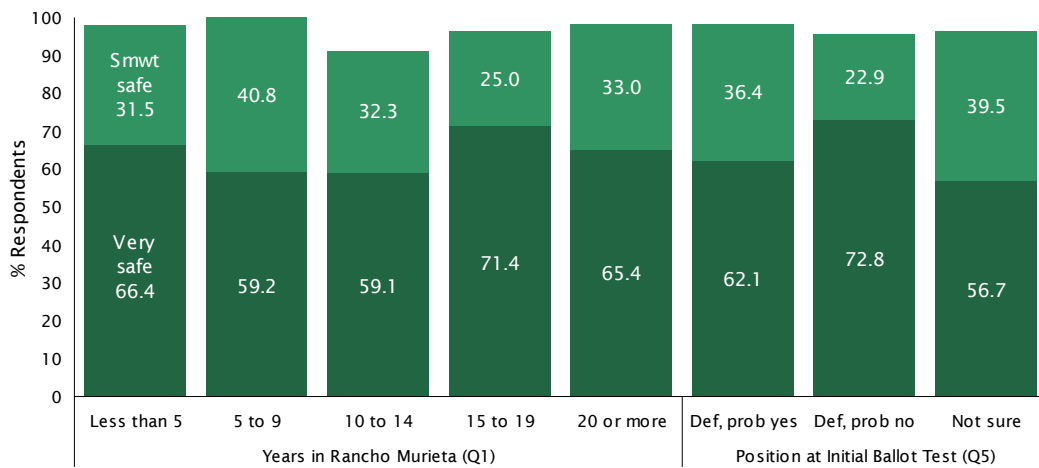
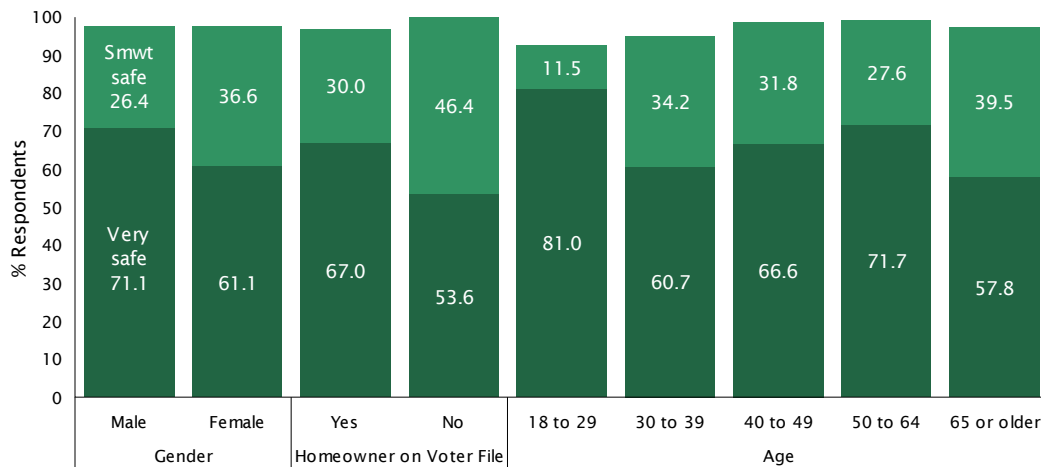


FIGURE 21 PERCEIVED SAFETY BY GENDER & HOMEOWNER ON VOTER FILE & AGE



The above notwithstanding, nearly half (49%) of respondent also felt that Rancho Murieta is less safe today than it was five years ago (see Figure 22), with nearly all of the remaining respondents being of the opinion that the level of safety today is about the same as five years ago (49%).

Question 17 *When compared to five years ago, would you say Rancho Murieta is safer today, about the same, or less safe?*

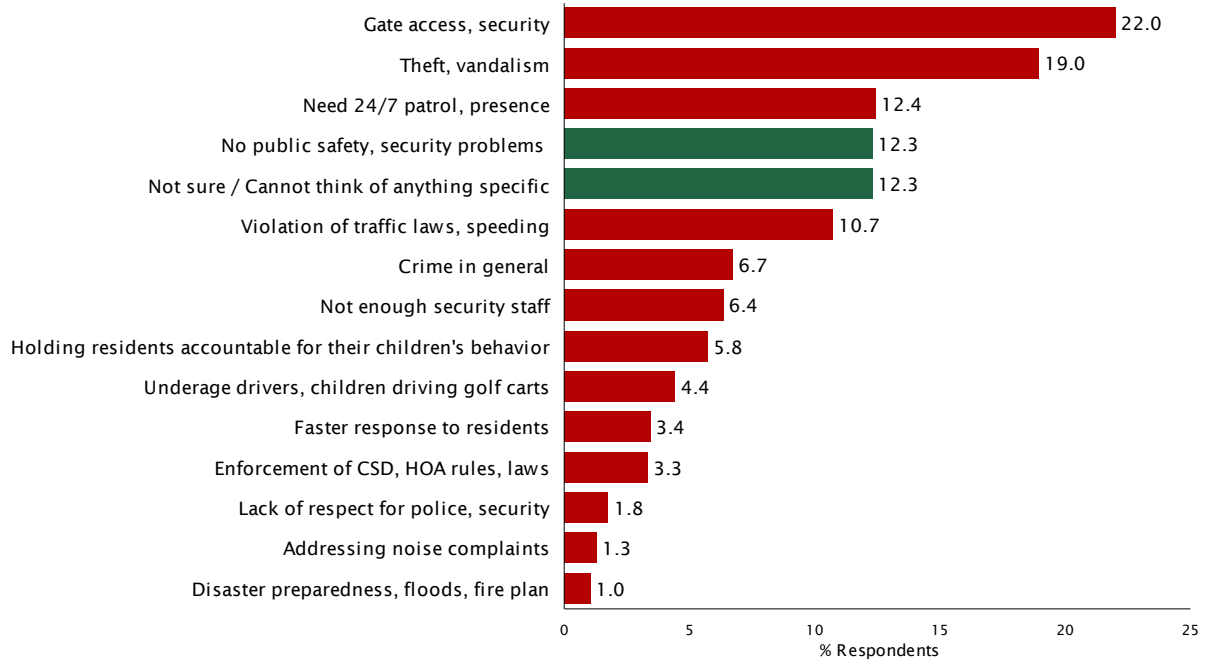
FIGURE 22 SAFETY COMPARED TO 5 YEARS AGO



MOST PRESSING PUBLIC SAFETY/SECURITY ISSUE Regardless of how safe they felt Rancho Murieta is as a place to live, all respondents were asked to identify the safety issue or security problem that they would *most* like to see addressed. Question 18 was presented in an open-ended manner, thereby allowing respondents to mention any issue that came to mind without being prompted by—or restricted to—a particular list of options. True North later reviewed the verbatim responses and grouped them into the categories shown in Figure 23 on the next page. Overall, the most frequently mentioned security issues that respondents who like to see addressed were gate access/security (22%), theft and vandalism (19%), and the need for 24 hour/7 day per week patrols and security presence (12%).

Question 18 *What is the public safety issue or security problem that you'd most like to see addressed in your community?*

FIGURE 23 PUBLIC SAFETY, SECURITY CONCERN





BACKGROUND & DEMOGRAPHICS

TABLE 8 DEMOGRAPHICS OF SAMPLE

<i>Total Respondents</i>	673
Years in Rancho Murieta (Q1)	%
Less than 5	22.5
5 to 9	15.1
10 to 14	10.1
15 to 19	17.2
20 or more	34.9
Prefer not to answer	0.1
Gender (QD2)	
Male	45.4
Female	49.8
Prefer not to answer	4.8
Party	
Democrat	24.9
Republican	53.8
Other / DTS	21.3
Age (QD1)	
18 to 29	7.6
30 to 39	8.8
40 to 49	13.2
50 to 64	28.8
65 or older	41.5
Registration Year	
Since Nov '18	7.1
Jun '12 to <Nov '18	18.1
Jun '06 to <Jun '12	6.4
Before Jun '06	68.4
Household Party Type	
Single dem	10.4
Dual dem	9.0
Single rep	14.1
Dual rep	27.6
Other	12.0
Mixed	26.9
Homeowner on Voter File	
Yes	85.0
No	15.0
Likely to Vote by Mail	
Yes	75.1
No	24.9
Likely Jun 2022 Voter	
Yes	77.6
No	22.4
Likely Nov 2022 Voter	
Yes, natural	95.0
Yes, GOTV	5.0

In addition to questions directly related to the proposed parcel tax measure, the study collected basic demographic information about respondents and their households. Some of this information was gathered during the interview, although much of it was collected from the voter file. The profile of the likely November 2022 voter sample used for this study is shown in Table 8.



M E T H O D O L O G Y

The following sections outline the methodology used in the study, as well as the motivation for using certain techniques.

QUESTIONNAIRE DEVELOPMENT Dr. McLarney of True North Research worked closely with the Rancho Murieta Community Services District to develop a questionnaire that covered the topics of interest and avoided possible sources of systematic measurement error, including position-order effects, wording effects, response-category effects, scaling effects, and priming. Several questions included multiple individual items. Because asking the items in a set order can lead to a systematic position bias in responses, items were asked in random order for each respondent.

Some of the questions asked in this study were presented only to a subset of respondents. For example, only individuals who did not support the parcel tax at the Initial Ballot Test (Question 5) were asked the follow-up open-ended Question 6 regarding their reasons for not supporting the measure. The questionnaire included with this report (see *Questionnaire & Toplines* on page 39) identifies the skip patterns that were used during the interview to ensure that each respondent received the appropriate questions.

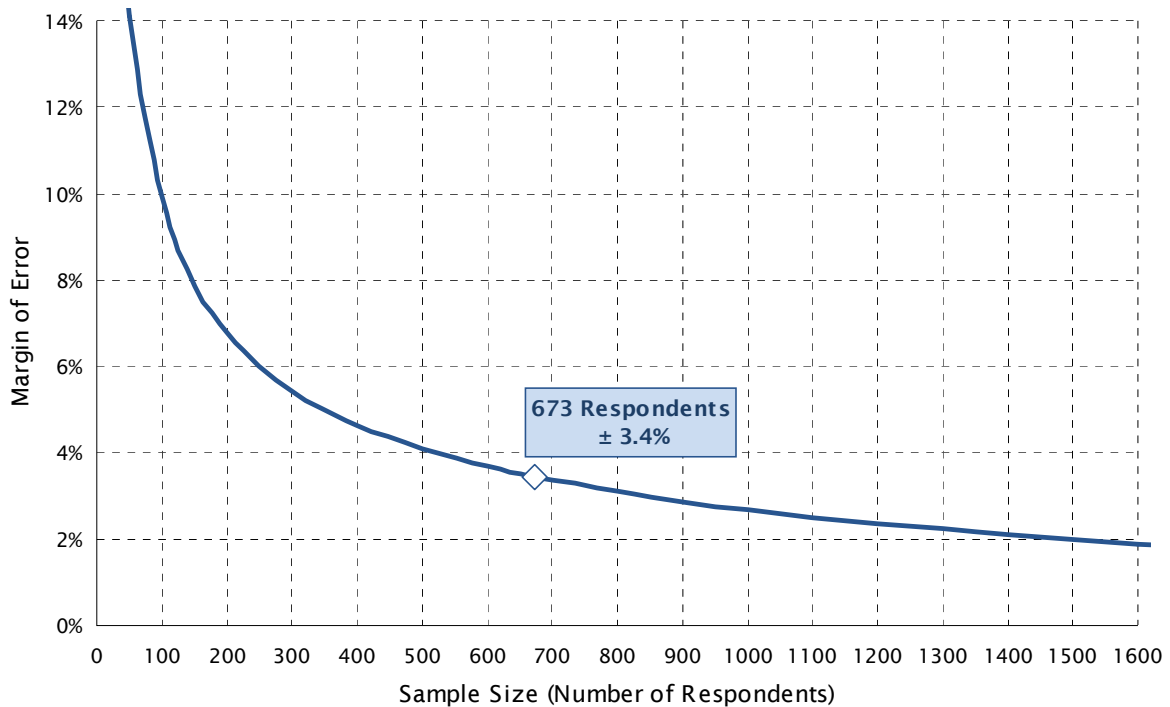
PROGRAMMING & PRE-TEST Prior to fielding the survey, the questionnaire was CATI (Computer Assisted Telephone Interviewing) programmed to assist interviewers when conducting the phone interviews. The CATI program automatically navigates the skip patterns, randomizes the appropriate question items, and alerts the interviewer to certain types of keypunching mistakes should they happen during the interview. The survey was also programmed into a pass-code-protected online survey application to allow online participation for sampled residents. The integrity of the questionnaire was pre-tested internally by True North and by dialing into voter households in the District prior to formally beginning the survey.

SAMPLE The survey was administered to a stratified and clustered random sample of 673 registered voters in the Rancho Murieta Community Services District who are likely to participate in the November 2022 election, either on the natural or as a result of get-out-the-vote efforts. Consistent with the profile of this universe, the sample was stratified into clusters, each representing a combination of age, gender, partisanship, and household party-type. Individuals were then randomly selected based on their profile into an appropriate cluster. This method ensures that if a person of a particular profile refuses to participate in the study, they are replaced by an individual who shares their same profile.

STATISTICAL MARGIN OF ERROR By using the probability-based sampling design noted above, True North ensured that the final sample was representative of voters in the District who are likely to participate in the November 2022 election. The results of the sample can thus be used to estimate the opinions of *all* voters likely to participate in the November 2022 election. Because not all voters participated in the study, however, the results have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what was found in the survey of 673 voters for a particular question and what would have been found if all 3,981 likely November 2022 voters identified in the District had been surveyed for the study.

Figure 24 provides a graphic plot of the *maximum* margin of error in this study. The maximum margin of error for a dichotomous percentage result occurs when the answers are evenly split such that 50% provide one response and 50% provide the alternative response. For this survey, the maximum margin of error is $\pm 3.4\%$.

FIGURE 24 MAXIMUM MARGIN OF ERROR DUE TO SAMPLING



Within this report, figures and tables show how responses to certain questions varied by subgroups such as age, gender, and partisan affiliation. Figure 24 is thus useful for understanding how the maximum margin of error for a percentage estimate will grow as the number of individuals asked a question (or in a particular subgroup) shrinks. Because the margin of error grows exponentially as the sample size decreases, the reader should use caution when generalizing and interpreting the results for small subgroups.

RECRUITING & DATA COLLECTION The survey followed a mixed-method design that employed multiple recruiting methods (mail, email, text and phone) and multiple data collection methods (phone and online). Phone interviews averaged 17 minutes in length and were conducted during weekday evenings (5:30PM to 9PM) and on weekends (10AM to 5PM). It is standard practice not to call during the day on weekdays because most working adults are unavailable and thus calling during those hours would likely bias the sample.

Voters recruited via email and/or text message were assigned a unique passcode to ensure that only voters who received an invitation could access the online survey site, and that each voter could complete the survey only one time. During the data collection period, an email reminder notice was also sent to encourage participation among those who had yet to take the survey. A total of 673 surveys were completed between February 5 and February 17, 2022.

DATA PROCESSING Data processing consisted of checking the data for errors or inconsistencies, coding and recoding responses, weighting, and preparing frequency analyses and cross-tabulations.

ROUNDING Numbers that end in 0.5 or higher are rounded up to the nearest whole number, whereas numbers that end in 0.4 or lower are rounded down to the nearest whole number. These same rounding rules are also applied, when needed, to arrive at numbers that include a decimal place in constructing figures and tables. Occasionally, these rounding rules lead to small discrepancies in the first decimal place when comparing tables and charts for a given question. Due to rounding, some figures and narrative include numbers that add to more than or less than 100%.

QUESTIONNAIRE & TOPLINES



Rancho Murieta Community Services District
 Security Measure Survey
 Final Toplines (n=673)
 February 2022

Section 1: Introduction to Study

Hi, may I please speak to _____. My name is _____, and I'm calling from TNR on behalf of the Rancho Murieta (MUR-ee-Eta) Community Services District. We're conducting a survey of voters about important issues in the community and I'd like to get your opinions.

If needed: This is a survey about important issues in your community. I'm NOT trying to sell anything and I won't ask for a donation.

If needed: The survey should take about 10 minutes to complete.

If needed: If now is not a convenient time, can you let me know a better time so I can call back?

If the person asks why you need to speak to the listed person or if they ask to participate instead, explain: For statistical purposes, at this time the survey must only be completed by this particular individual.

Section 2: Quality of Life & Local Issues

Q1	To begin, how long have you lived in Rancho Murieta (MUR-ee-Eta)?	
1	Less than 1 year	2%
2	1 to 4 years	21%
3	5 to 9 years	15%
4	10 to 14 years	10%
5	15 to 19 years	17%
6	20 years or longer	35%
99	Prefer not to answer	0%
Q2	How would you rate the overall quality of life in your community? Would you say it is excellent, good, fair, poor or very poor?	
1	Excellent	53%
2	Good	44%
3	Fair	3%
4	Poor	0%
5	Very Poor	0%
98	Not sure	0%
99	Prefer not to answer	0%

Q3	If you could change <i>one</i> thing to make Rancho Murieta (MUR-ee-Eta) a better place to live, what change would you like to see? <i>Verbatim</i> responses recorded and later grouped into categories below.						
	Improve public safety, security, reduce crime						26%
	Provide new country club, community center, pool						20%
	Limit growth, development						9%
	Enforce community rules, codes						9%
	No changes needed / Everything is fine						8%
	Not sure / Cannot think of anything						7%
	Beautify communities, landscaping						4%
	Enforce traffic laws, reduce speeding						4%
	Provide more community events, activities for all ages						3%
	Improve government structure, leadership, communication						3%
	Improve RMCC						2%
	Reduce fees, taxes						2%
	Attract stores, dining, shopping opportunities						2%
	Improve infrastructure, roads						2%
	Improve planning, development						2%
	Improve diversity of communities, events						2%
	Allow, improve access, permits through gate						2%
Q4	Next, I'm going to read a list of issues facing your community and for each one, please tell me how important you feel the issue is to <i>you</i> , using a scale of extremely important, very important, somewhat important or not at all important.						
	Here is the (first/next) issue: _____. Do you think this issue is extremely important, very important, somewhat important, or not at all important?						
	<i>Randomize</i>	Extremely Important	Very Important	Somewhat Important	Not at all Important	Not sure	Prefer not to answer
A	Maintaining local streets and roads	31%	53%	14%	1%	0%	0%
B	Managing growth and development	49%	31%	16%	3%	0%	0%
C	Preventing trespassing in the community	60%	24%	14%	2%	0%	0%
D	Improving public safety	41%	32%	23%	3%	1%	0%
E	Preventing local tax increases	30%	30%	32%	6%	1%	1%
F	Protecting local property values	56%	31%	10%	3%	0%	1%
G	Maintaining a low crime rate	70%	22%	6%	2%	0%	0%
H	Preparing for emergencies and natural disasters	30%	37%	28%	4%	0%	0%

I	Maintaining an ample supply of safe drinking water	80%	17%	2%	0%	0%	0%
J	Preventing unauthorized access to Calero and Chesbro reservoirs	31%	32%	28%	8%	1%	1%

Section 3: Initial Ballot Test

Next year, voters in your community may be asked to vote on a local ballot measure. Let me read you a summary of the measure.

Q5 In order to:

- Prevent crime and better protect the lives and property of Rancho Murieta residents and businesses
- Provide additional patrols by Sheriff's deputies and security patrol staff
- And continue gated security 24 hours per day, year round

Shall the Rancho Murieta Community Services District measure be approved levying \$298 annually per parcel, providing 800 thousand dollars annually until ended by voters, with all money staying local?

If the election were held today, would you vote yes or no on this measure? *Get answer, then ask: Would that be definitely (yes/no) or probably (yes/no)?*

1	Definitely yes	31%	Skip to Q7
2	Probably yes	29%	Skip to Q7
3	Probably no	14%	Ask Q6
4	Definitely no	16%	Ask Q6
98	Not sure	8%	Ask Q6
99	Prefer not to answer	1%	Skip to Q7

Q6 Is there a particular reason why you do not support or are unsure about the security measure I just described? *If yes, ask: Please briefly describe your reason. Verbatim responses recorded and later grouped into categories below.*

Public safety, security is okay as-is, no need for more money	22%
Taxes, fees already too high	19%
Need more information	18%
Money is misspent, mismanaged	11%
Measure is too expensive	11%
Negative comments about police, security patrols	8%
Not sure / No particular reason	7%
Other ways to be funded	4%
Do not trust CSD	3%
Mentioned past measures	2%
Other higher priorities in community	2%

Section 4: Tax Threshold							
Q7	The measure I just described would raise money through annual property taxes paid by residential and commercial property owners. However, the amount to be charged to each parcel has not been determined yet.						
	If you knew that your household would pay an additional _____ per year, would you vote yes or no on the measure? <i>Get answer, then ask: Would that be definitely (yes/no) or probably (yes/no)?</i>						
<i>Read in sequence starting with the highest amount (A), then the next highest (B), and so on. If respondent says 'definitely yes', record 'definitely yes' for all LOWER dollar amounts and go to next section.</i>							
	<i>Ask in Order</i>	Definitely Yes	Probably Yes	Probably No	Definitely No	Not sure	Prefer not to answer
A	298 dollars	27%	29%	15%	17%	10%	1%
B	248 dollars	28%	29%	15%	17%	9%	1%
C	198 dollars	37%	25%	12%	16%	9%	1%
D	96 dollars	51%	22%	8%	10%	7%	1%

Section 5: Services & Improvements							
Q8	The measure we've been discussing would provide funding for a variety of security services and improvements. <u>If the measure passes</u> , would you favor or oppose using some of the money to: _____, or do you not have an opinion? <i>Get answer, if favor or oppose, then ask: Would that be strongly (favor/oppose) or somewhat (favor/oppose)?</i>						
	<i>Read A, B & C first, then randomize remaining items.</i>						
		Strongly Favor	Somewhat Favor	Somewhat Oppose	Strongly Oppose	Not sure	Prefer not to answer
A	Continue providing security gate officers 24 hours per day, year-round, to control community access and prevent trespassing	81%	9%	2%	5%	2%	0%
B	Provide private security patrols and emergency response 24 hours per day, year-round	55%	23%	7%	10%	4%	1%
C	Provide additional patrols by Sheriff's deputies with full law enforcement powers	48%	26%	10%	11%	4%	0%
D	Better enforce speed limits and safe driving practices	33%	38%	14%	9%	5%	1%
E	Reduce vandalism, graffiti, and property damage	65%	26%	4%	3%	2%	0%
F	Reduce trespassing by non-residents	63%	26%	4%	4%	2%	0%
G	Enforce RMA rules	35%	35%	14%	10%	4%	1%
H	Deter major crimes including burglary and theft	76%	16%	2%	4%	2%	1%
I	Patrol open space areas to reduce trespassing and fire risk	45%	38%	7%	5%	5%	0%

Section 6: Positive Arguments

What I'd like to do now is tell you what some people are saying about the measure we've been discussing.

Q9 Supporters of the measure say: _____. Do you think this is a very convincing, somewhat convincing, or not at all convincing reason to **SUPPORT** the measure?

		Very Convincing	Somewhat Convincing	Not At All Convincing	Don't Believe	Not sure	Prefer not to answer
	<i>Randomize. Split Sample C1 & C2</i>						
A	All money raised by this measure will be spent to provide security, safety, and law enforcement services in Rancho Murieta. The money can't be taken away by the State or used for other purposes.	45%	26%	12%	11%	4%	2%
B	There will be a clear system of accountability including independent audits, citizen oversight, and annual reports to the community to ensure that the money is spent properly.	33%	36%	16%	11%	3%	1%
C1	One of the main reasons people move to Rancho Murieta is to be in a safe, gated community with private security. If we want to keep our community safe, we need to support this measure.	44%	29%	16%	6%	2%	2%
C2	The choice is ours - we can invest in keeping Rancho Murieta a safe and secure place to live, or we can cut back on private security and be like any other community.	32%	24%	27%	9%	5%	2%
D	Earlier this year, California made more than 76,000 (seventy-six thousand) prisoners eligible for early parole, which means a lot more criminals are being released into the greater Sacramento area. This measure provides the funds needed to combat crime in our community.	22%	25%	34%	14%	3%	2%
E	This measure will ensure that we always have a security officer available to respond quickly to emergencies - day or night. If we cut back on security, that won't be the case.	41%	31%	14%	9%	4%	2%
F	By keeping our community safe and secure, this measure will help protect our property values and keep Rancho Murieta a special place to live.	40%	38%	14%	5%	2%	1%
G	The District does not receive the revenues needed to continue providing security services at their current levels. If this measure doesn't pass, the District will be forced to cut back on security officers and security patrols.	33%	30%	18%	13%	4%	2%

Section 7: Interim Ballot Test			
Sometimes people change their mind about a measure once they have more information about it. Now that you have heard a bit more about the measure, let me read you a summary of it again.			
Q10	In order to: <ul style="list-style-type: none"> Prevent crime and better protect the lives and property of Rancho Murieta residents and businesses Provide additional patrols by Sheriff's deputies and security patrol staff And continue gated security 24 hours per day, year round 		
	Shall the Rancho Murieta Community Services District measure be approved levying \$298 annually per parcel, providing 800 thousand dollars annually until ended by voters, with all money staying local? If the election were held today, would you vote yes or no on this measure? <i>Get answer, then ask:</i> Would that be definitely (yes/no) or probably (yes/no)?		
	1	Definitely yes	31%
	2	Probably yes	27%
	3	Probably no	14%
	4	Definitely no	19%
	98	Not sure	8%
	99	Prefer not to answer	1%

Section 8: Negative Arguments							
Next, let me tell you what opponents of the measure are saying.							
Q11	Opponents of the measure say: _____. Do you think this is a very convincing, somewhat convincing, or not at all convincing reason to OPPOSE the measure?						
	<i>Randomize</i>	Very Convincing	Somewhat Convincing	Not At All Convincing	Don't Believe	Not sure	Prefer not to answer
A	Property owners are already paying the District a lot of money for water, sewer, and security. The District has plenty of money – they just need to do a better job managing it.	29%	36%	18%	11%	5%	1%
B	Many of our residents and local businesses have been hit hard by the pandemic and are struggling to stay afloat. Now is <i>not</i> the time to raise taxes.	21%	31%	31%	11%	5%	2%
C	This tax will last forever. There is no expiration date.	30%	28%	26%	8%	7%	1%
D	The tax amount will automatically increase 3% every year.	25%	27%	23%	12%	11%	1%
E	They should outsource security to a private company. We'd get more for our money.	10%	23%	34%	22%	10%	1%

Section 9: Final Ballot Test

Now that you have heard a bit more about the measure, let me read you a summary of it one more time.

In order to:

- Prevent crime and better protect the lives and property of Rancho Murieta residents and businesses
- Provide additional patrols by Sheriff's deputies and security patrol staff
- And continue gated security 24 hours per day, year round

Q12 Shall the Rancho Murieta Community Services District measure be approved levying \$298 annually per parcel, providing 800 thousand dollars annually until ended by voters, with all money staying local?

If the election were held today, would you vote yes or no on this measure? *Get answer, then ask: Would that be definitely (yes/no) or probably (yes/no)?*

1	Definitely yes	29%	Skip to Q14
2	Probably yes	27%	Skip to Q14
3	Probably no	17%	Ask Q13
4	Definitely no	18%	Ask Q13
98	Not sure	8%	Ask Q13
99	Prefer not to answer	1%	Skip to Q14

Q13 What if the tax rate were set at a *lower* amount -- \$171 per year? This is the amount needed to continue providing the *current* levels of security in the community and avoid having to make deep cuts to security patrols.

Would you vote yes or no on the measure at this rate to *maintain* the current levels of security services? *Get answer, then ask: Would that be definitely (yes/no) or probably (yes/no)?*

	Def, prob yes @ \$298 (Q12)	56%
1	Definitely yes	2%
2	Probably yes	8%
3	Probably no	12%
4	Definitely no	12%
98	Not sure	8%
99	Prefer not to answer	1%

Section 10: Privatizing Security

Q14	Security services are provided directly by the Rancho Murieta Community Services District, which is a public agency. Some have suggested that security should be outsourced to a private company. In general, which do <i>you</i> prefer - that security continue to be provided by the Community Service District, or that it be outsourced to a private security company?			
	1	Continue to be provided by Community Services District	56%	Ask Q15
	2	Outsourced to a private security company	13%	Skip to Q16
	98	Not sure	28%	Ask Q15
	99	Prefer not to answer	3%	Skip to Q16
Q15	Outsourcing to a private security company would result in an estimated savings of 20% in the costs of providing services. Knowing this, which do you prefer - that security continue to be provided by the Community Service District, or that it be outsourced to a private security company?			
	1	Continue to be provided by Community Services District	49%	
	2	Outsourced to a private security company	23%	
	98	Not sure	27%	
	99	Prefer not to answer	1%	

Section 11: Relevant Attitudes & Background

Thank you so much for your participation. I have just a few background questions for statistical purposes.

Q16	Overall, how safe is Rancho Murieta as a place to live? Would you say it is very safe, somewhat safe, somewhat unsafe, or very unsafe?		
	1	Very safe	65%
	2	Somewhat safe	32%
	3	Somewhat unsafe	2%
	4	Very unsafe	0%
	98	Not sure	0%
	99	Prefer not to answer	0%

Ask Q17 if Q1 = (3-7). Otherwise skip to Q18.

Q17		
When compared to five years ago, would you say Rancho Murieta is safer today, about the same, or less safe?		
1	Safer today	1%
2	About the same	49%
3	Less safe today	49%
98	Not sure	2%
99	Prefer not to answer	0%
Q18		
What is the public safety issue or security problem that you'd <i>most</i> like to see addressed in your community?		
	Gate access, security	22%
	Theft, vandalism	19%
	Need 24/7 patrol, presence	12%
	No public safety, security problems	12%
	Not sure / Cannot think of anything specific	12%
	Violation of traffic laws, speeding	11%
	Crime in general	7%
	Not enough security staff	6%
	Holding residents accountable for their children's behavior	6%
	Underage drivers, children driving golf carts	4%
	Faster response to residents	3%
	Enforcement of CSD, HOA rules, laws	3%
	Lack of respect for police, security	2%
Those are all of the questions that I have for you. Thanks so much for participating in this important survey.		

Post-Interview & Sample Items

S1		
Gender		
1	Male	45%
2	Female	50%
3	Prefer not to answer	5%

S2 Party		
1	Democrat	25%
2	Republican	54%
3	Other	5%
4	DTS	16%
S3 Age on Voter File		
1	18 to 29	8%
2	30 to 39	9%
3	40 to 49	13%
4	50 to 64	29%
5	65 or older	42%
S4 Registration Date		
1	Since Nov 2018	7%
2	Jun 2012 to before Nov 2018	18%
3	Jun 2006 to before Jun 2012	6%
4	Before June 2006	68%
S5 Household Party Type		
1	Single Dem	10%
2	Dual Dem	9%
3	Single Rep	14%
4	Dual Rep	28%
5	Single Other	6%
6	Dual Other	6%
7	Dem & Rep	5%
8	Dem & Other	7%
9	Rep & Other	13%
0	Mixed (Dem + Rep + Other)	1%
S6 Homeowner on Voter File		
1	Yes	85%
2	No	15%

Rancho Murieta Security Measure Survey

February 2022

S7	Likely to Vote by Mail		
	1	Yes	75%
	2	No	25%
S8	Likely June 2022 Voter		
	1	Yes	78%
	2	No	22%
S9	Likely November 2022 Voter		
	1	Yes, natural	95%
	2	Yes, GOTV	5%

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Rancho Murieta CSD

Community Services District

Strategic Services Proposal

Prepared for

Rancho Murieta

Community Services District

From

CliffordMoss.

CliffordMoss
5111 Telegraph Avenue No.307
Oakland, CA 94609
Laura Crotty, Vice President
408-839-5556
Bonnie Moss, Principal
510-907-3195
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March 30, 2022

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Appendix

Exhibit 1. Case Studies

Exhibit 2. The CliffordMoss Promise

CliffordMoss.

POLITICAL STRATEGY | COMMUNICATIONS | PUBLIC AFFAIRS

March 30, 2022

Mr. Tom Hennig
General Manager
Rancho Murieta Community Services District
15160 Jackson Road,
Rancho Murieta CA 95683

Via Email to: **Tom Hennig**, thennig@rmcsd.com

RE: Strategic Services Proposal

Dear Mr. Hennig,

Thank you for reaching out and for your recent conversation with us about your Rancho Murieta Community Services District needs. We have enjoyed learning more about your needs and exploring how we can help you. Per your request, **CliffordMoss LLC is pleased to present this proposal** for strategic communications services and local revenue measure preparation, for the board vote on potentially placing a measure on the November 2022 ballot.

About Us. CliffordMoss is a boutique Oakland-based professional services firm dedicated to building better communities through our strategic communications, political strategy, election planning, and campaign services. Every day, we bring a spirit of innovation to our work that helps our clients achieve their goals and win the hearts and minds of their communities. We challenge the conventional wisdom that other public affairs firms generally practice. Our seasoned team members have deep and relevant experience – collectively, more than five decades working with California local public agencies – in all aspects of preparing for and passing local revenue measures that win - even where there is competition on the local ballot, organized opposition, anti-tax politics, and/or a history of previous failed attempts.

Our track record is a source of pride: currently 92.3% overall (95.7% for November tax elections) since we opened our firm nearly ten years ago. Our successes include numerous community measures and communications projects in a variety of terrains, including elsewhere in Sacramento County and across the state. The bottom line is this: over the past decade, we have helped secure billions of dollars in funding to improve the quality of local public services and infrastructure for special districts, cities, schools, libraries, parks, hospitals, fire and healthcare districts, transportation, housing, childcare programs, and other essential public services across California. Whether in the East Bay or elsewhere, our work is helping to transform local communities for the better.

Our CliffordMoss team is eager to assist **you** in achieving **your** goals for the Rancho Murieta Community Services District. We look forward to showing you what our team can do for you. It all starts with a story – your story. Our job is to bring that story to life. **Let us tell your story. Thank you** for your consideration.

Sincerely,



Bonnie Moss
Principal, **CliffordMoss LLC**
510-757-9023 | bonnie@cliffordmoss.com



Laura Crotty
Vice President, **CliffordMoss LLC**
408-839-5556 | laura@cliffordmoss.com

1. Firm Overview

About CliffordMoss | www.cliffordmoss.com

CliffordMoss is a leading California strategic communications firm, specializing in election consulting, political strategy, and public communications services. To stay nimble and responsive to clients, we have 9 employees as well as a network of highly qualified associates throughout the state that join us on projects when needed. *We are not the typical political strategy corporation.* CliffordMoss is a boutique strategic communications firm whose principals and project leaders collectively stand ready to bring a fresh approach to Rancho Murieta Community Services District (CSD) enriched by over 50 years of directly relevant experience. We've built our firm on three core principles:

Your community is unique ◆ **Listening is a lost art** ◆ **People support what they help create**

We use these principles to help you tell your story in an honest and compelling way. We use them to help you engage, listen, and build relationships. Most importantly, we use them to help you see opportunities through a *win-win* lens, so **you** can inspire *others to rise* and champion your cause from the outside in. We understand that your primary focus is day-to-day operations. With that said, our job is to help *facilitate, train, and coach* you in navigating wisely so you can successfully navigate the political terrain.

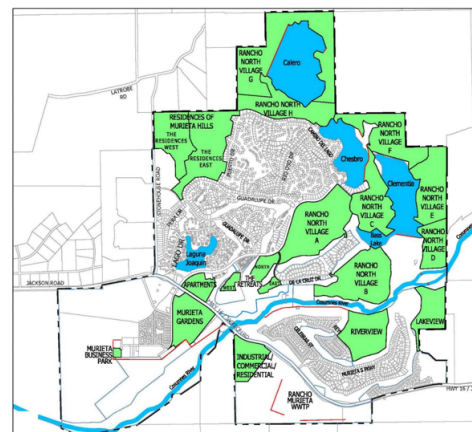
Competitive Strengths of Our Team:

1. **Smart, Reliable Foundational Strategic Communications Work.** We will help focus to inform educate and engage your Rancho Murieta CSD community on **its** terms, and build the evidence that **we are LISTENING** and truly interested in what your community thinks. As we move down this path, we will maintain our allegiance to the revealing data, letting the evidence tell us where we need to go next.
2. **Creative Communications and Messaging "Edge."** We respect your community's UNIQUENESS! We work hard to combine old-school direct mail, flyers, and door-to-door communications with new-school video and online and social media messaging, content, and placement to achieve maximum impact.
3. **Our Style - Invested in YOU and YOUR Success.** CliffordMoss is client-centered and client-driven. We invest deeply in you, guiding you through a potentially complex, organic, uncertain process to achieve your goals. We don't tell our clients what to do. We practice the higher art of "*facilitating, training, and coaching.*" We make the effort to LISTEN. We work hard to get things right the first time. We are not rigid or stuck in a routine or past templates. We are not afraid to take calculated risks when conditions require it. Our commitment calls on us to stay on the cutting edge of innovation, and you will see us bring that value to you in thought partnership, communications work, service orientation, and results.
4. **Outstanding Work Products.** We work with peak-performing industry vendors to deliver winning results and work products. Our network includes creative graphic designers, leading print production and data services providers, cutting-edge online advertising and communications firms, and media practitioners.
5. **Strategic Approach.** At our core, we are strategists and community organizers. We focus on building the right strategy for the right ballot package for the right election. We are successful because we invest in building strategies that deliver results, whether in "blue sky", cloudy, or turbulent political environments.
6. **We WIN!** Since opening our doors nearly 10 years ago, CliffordMoss has maintained an overall **92.3%** win rate. For November election tax measures such as the measure you envision, our win rate is **95.7%**.

2. Your Story

What is the story YOU need to tell? Our CliffordMoss team is achieving great success helping our clients tell their stories in memorable ways that attract interest and support. We look forward to sharing what's working across the state. For now, we will be eager to learn what your "Rancho Murieta Community Services District story of need" is – in your own words. **We find the following elements of your story compelling:**

- **Rancho Murieta Community Services District** was formed in 1982 and provides essential services to an area of 3,500 acres located in the scenic hills of eastern Sacramento County. The community is made up of over 2,500 households and 6,000 people, 4,840 of whom are registered voters in the district. Although a relatively small district, Rancho Murieta CSD manages over \$43 million in plant, property, and equipment assets. The district is governed by a five-member Board of Directors who are elected at large within the jurisdiction.
- **Rancho Murieta CSD is a unique one a kind district in California in that it provides security.** RMCS D also provides the following in addition to security:
 - Water supply collection, treatment, and distribution
 - Wastewater collection, treatment, and reuse
 - Storm drainage collection, disposal, and flood control
 - Solid waste collection and disposal
- **Security Needs and Sentiment:** Overall, the community appreciates the security provided by RMCS D. The issue is that maintaining security as costs rises is becoming harder, and even harder would be additional security (which has been the request of some community members). In order to maintain security, additional funding is needed.
- **RMCS D conducted a poll** in February where key takeaways include: 97% of voters state the quality of life is excellent or good; Safe drinking water and maintaining a low crime rate rated above 90% importance; support for a potential measure ranged from 60%-73% with ranges aligned with the tax rates tested between \$96 per year and \$298 per year.
- **Local Revenue History:** Rancho Murieta CSD last passed a revenue measure in 1998, Measure J. This measure created funds for a Security Department within the district, to be funded through a special tax rather than a fee. However, as the community has expanded and its needs along with it, the allocated taxes are no longer enough to continue funding this important service. In the 2020-21 Fiscal Year, the Security Department was \$450,000 over budget. Additional revenue will be needed to maintain security services including; operating security gates 24/7, providing 24-hour mobile patrols, maintaining radio communications with other external public safety agencies, providing direct emergency assistance, and monitoring and registering guests and visitors.
- **Developments:** Rancho Murieta CSD has several ongoing development projects including but not limited to the Murieta Gardens, Murieta Inn, FAA Business Park, PDF Office, Circle K Convenience/Carwash/Subway, Riverview, The Retreats East and North, Rancho Murieta North, Lakeview, Murieta Hills Estates, and others. These projects are a combination of infrastructure, residential, and business developments that will accommodate the community's growth.

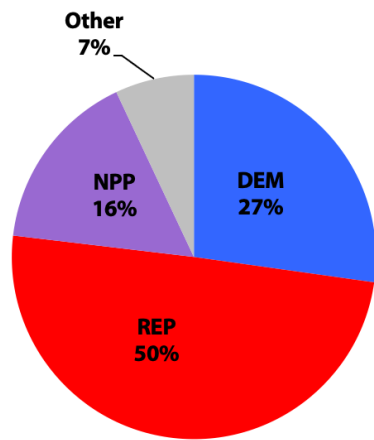


Your Unique Voter Profile

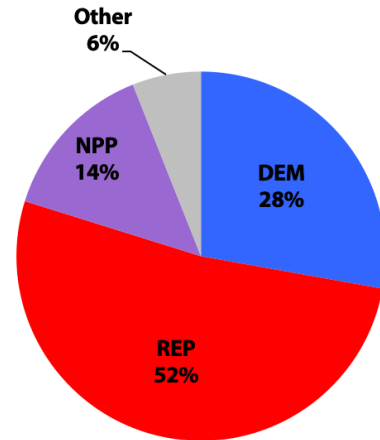
Understanding the uniqueness of your *Rancho Murieta Community Services District* universe of voters will be critical to achieving your electoral goal. To that end, we dig deep into voter data to understand your voters. Here is just a brief snapshot of the kind of data we will analyze and have available for your project.

Descriptor	Voters - #	Voters - %
All Voters	4,840 Voters / 2,444 Households Vote By Mail: 84.6% In Person:15.4%	100%
Likely Voters November 2022	4,128 Voters / 2,250 Households Vote By Mail: 85.3% In Person:14.7%	85.3%

By Party

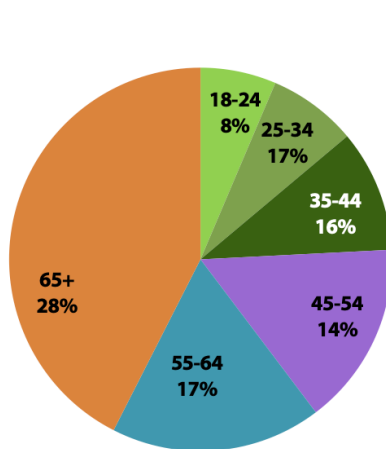


ALL Voters

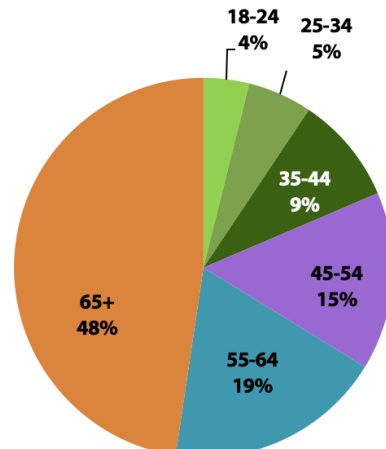


Nov 2022

By Age



ALL Voters



Nov 2022

3. Proposed Scope of Work

FIRST – We will make the time to listen to you. At CliffordMoss, we believe LISTENING is a lost art. Many firms will come in and tell you exactly what you should do without getting to know who you are and what makes your city unique. We won't do that. We will sit with you – and others you think we can learn from, including your board members, key staff, and other key communicators until we understand you, your needs, and the conditions that you believe will help achieve your goals in today's election environment.

We will proceed along two deliberate tracks using proven tools to navigate the way forward:

PHASE 1: Strategic Planning and LISTENING

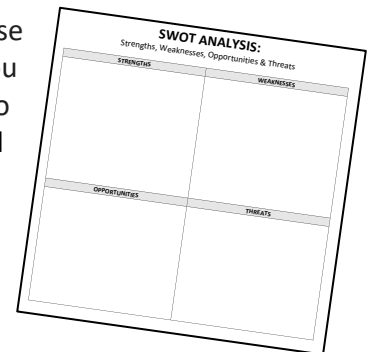
PHASE 2: Public Education and Ballot Measure Preparation

Here, in greater detail, is what you can expect from our team as we help you prepare for success:

Phase 1: Strategic Planning and Early Listening
Timeline: ASAP!

Most special district projects start with a feasibility analysis emphasizing polling and research. You have already completed a poll with Dr. McLarney at True North Research – GREAT! At CliffordMoss, we propose to go a step further, to enrich your scientific data with strategic listening and communications work that will help to better understand your current political playing field, and provide anecdotal real community conversation evidence that qualitatively helps us deeper understand the quantitative poll results.

Political Analysis. One of CliffordMoss' most important responsibilities in the Phase 1 process is to analyze and anticipate with you the political terrain ahead to help you navigate the future successfully. We view this work as both art and science. No two communities are the same. We will work with you to conduct a series of political diagnostic exercises to improve our collective understanding of your political playfield and dynamics. We may employ tools such as "power-mapping" or "network mapping" to help us obtain community input on Rancho Murieta CSD's needs, challenges and your proposed solution (i.e. a potential 2022 ballot measure).



People Support What They Help Create. We must build a community conversation infrastructure, including face-to-face (or Zoom) meetings, where your ballot measure emerges out of intentional community engagement and LISTENING work along with your expertise as district leaders, managers, and staff. In this way, we expect your potential ballot measure will be in alignment with the Rancho Murieta community because opinion leaders and community members see that their input actually helped build the plan.

Listening Strategy. We deliberately make time to listen and learn from those most likely to influence the outcome of your potential measure. By employing our proven diagnostic tools, including opinion leader interviews and stakeholder meetings (whether in-person, via zoom technology, or conference call), we are better able to understand your stakeholders, and, most importantly, get an early understanding of **your voters** (the ultimate decision makers in the exercise ahead).

As we move down this path – feasibility analysis, strategic assessment, and early listening work – we maintain our allegiance to the revealing data, letting the evidence tell us where we need to go next. This is why we resist making judgments on what will work or will not work until we have concluded all aspects of our Feasibility work.

PHASE 2: Public Education and Ballot Measure Preparation

It will be CRITICAL to plan ahead and tailor your informational communications so that they address the unique circumstances of your community and situation EARLY in the process and do not confuse your voters. Our narrative must fully explain the purpose of your measure, the reason it's been placed on the ballot, and the importance of this measure to your community. We look forward to further discussing the unique factors of this situation with you if given the chance to interview.

In Phase 2, our goal will be to get you “election-ready.” Expect the following:

1. STRATEGIC CONSENSUS AS WE BEGIN PHASE 2 – i.e. internal team agreement about where we stand, what package and schedule we're aligning with, and which election we're targeting. There is a particular science to the work we do. Armed with results and data from Phase 1, the CliffordMoss team helps you plan for a Phase 2 effort that helps you build the momentum necessary to move down the electoral path.

2. EFFECTIVE STAKEHOLDER ENGAGEMENT, MESSAGING & INFORMATIONAL OUTREACH. We employ messaging strategies to engage voters and stakeholders in compelling, memorable ways. We take the time to listen and learn from those most likely to influence the outcome of your election. **PROVEN STRATEGIES** we use (especially with voters!) to engage, listen, educate, and build awareness include:

Effective use of TIME. Effective use of time to meaningfully communicate with the various Rancho Murieta constituencies – from security professionals, to retired public servants, to senior citizens, to ALL voters – will be valuable in enabling you to calibrate your communications and create streamlined methods of sharing information that are the highest and best use of your resources. The sooner this process begins, the better.

“Outbound” Public Information & Communications Support. We will review your existing communications operation with a strategic lens to identify opportunities for improving educational impact; rapid-response capabilities/results; reaching additional audiences; engaging grassroots organizations and leaders to participate in the discussion through micro-networks; and customizing communications tools to facilitate more participation in the conversation, especially at the ground-community level.

Message. After we conduct our diagnostics, we will develop a message/narrative. Messaging is key. (Your measure needs an identity, a brand. It needs to be more than just a “security for Rancho Murieta”) **Your measure needs to tell a story that resonates with voters.** Our job will be to localize that story for your community (micro-climates) and voters.

Public Education. This effort will be to create alignment in the Rancho Murieta community around the need for and benefits of your proposed measure. **Our goal will be to bring a greater understanding to the voter community of the vital role you play in helping maintain essential security services to Rancho Murieta residents - and most importantly, the NEED for your ballot measure.**

NOTE: Creative, Compelling Branding is a CliffordMoss Specialty

Unlike “volume shops” in our industry, CliffordMoss takes great care in building a look and brand that FITS the uniqueness of your story and YOUR community of voters. It does not need to be flashy, but it needs to resonate with your Rancho Murieta voters. Here is an example of an information ONLY brand/logo visual we created for the City of Colton tax revenue measure.



COMMUNICATION TOOLS: CliffordMoss has many **proven tools** in our communications “tool kit”, including strategies to hold down costs while communicating effectively in a robust public engagement and information plan.



Your plan could benefit from the following proven CliffordMoss tools/strategies:

- **OPINION LEADER and STAKEHOLDER WORK.** We use and recommend this methodology to engage community leaders as early as possible. As part of this effort, we may guide you in the process of “**network-mapping**” the community and engaging those who lie on the network map in opinion leader interviews and other strategic meetings to get their sense of the community, your needs, and your goals. Costs are minimal. Our team invests heavily in tools and client training to maximize impact.



- **PUBLIC MEETINGS (VIRTUAL IF NECESSARY).** We recommend this methodology to engage, educate, and seek input that can be reflected in the eventual measure. This could be as simple and effective as a telephone town hall, or a virtual town hall. Our team invests heavily in tools and client training here to maximize impact.
- **DISTRICT-SPONSORED INFORMATIONAL OUTREACH.** Even during the election window, public agencies are permitted to provide information about a ballot measure to the public provided that the material is factual and does not advocate up or down on the measure.

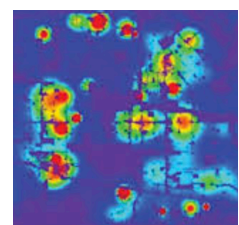
- **DIRECT MAIL.** Whether you like direct mail or not, this vehicle is still the most effective way to communicate with voters at all levels. We have created a number of successful public agency mail programs with a creative, customized focus on each individual micro-community. These programs build interest and awareness of your Rancho Murieta CSD NEEDS.



- **WEB / ONLINE / SOCIAL MEDIA.** Early in the communication phase, it is easy and important to plug into the existing infrastructure of RMCS D to INFORM AND ENGAGE stakeholders. We know that community members connect and engage with each other online – especially in Rancho Murieta. It is important to provide factual information and ask for members to “plug into” the conversation – whether that be an online survey, telephone town hall, virtual coffee, or more! We use the option of paid online “PSA’s” to make sure your important messages reach all community members – especially those who will end of making the decision.

- **VIDEO.** Video is powerful, especially SHORT video. They can be shared online, invite feedback, and more. We are seeing video used more and more to share important information in a short digestible package.

- **MESSAGING AROUND KEY SPECIFIC STAKEHOLDERS.** If the RMCS D’s potential ballot measure has been vetted by key groups, and the group has taken a position on the potential measure, we will want to discuss and strategize about the implications of that position and develop appropriate communications. If CliffordMoss is chosen to be your partner in this project, we look forward to strategizing on this topic early in the process.



WORK WITH YOU TO EFFECTIVELY PACKAGE YOUR MEASURE. We will work with you to complete the following ballot measure preparation essentials:

- Collaborate with you and RMCSO consultants on final bond package components.
- Finalize core messaging (we know the words and format that work with best with voters!)
- Prepare your ballot language, including the all-important 75-word Ballot Statement.
- Work with you, legal counsel, and the County Registrars of Voters (ROV) to ensure that your ballot measure package filed is the right package for electoral success.
- Prepare the ballot measure statement, argument, and rebuttal (if needed).
- Provide guidance on media efforts to help position Rancho Murieta CSD effectively.
- Provide ongoing strategic counsel to help you navigate the political terrain.

In short, our role is to bring the unique, neutral, and experienced tax measure election expert perspective to your team, **working with you** to customize and drive your process in ways that form the foundation to mobilize support and ensure that an informed public is voting on your ballot measure.

Our goal is to make this process manageable and successful for you and your team. You are considering placing a revenue measure on your local ballot – **and that is a significant undertaking.** We are here to facilitate, train, and coach you so you can effectively inform/educate your community and work towards continuing to provide essential security.

Estimated number of meetings, conference calls and other work: We align to the needs of our clients first and foremost. We view **TIME** as your most valuable resource – you will see us use it wisely. As a general rule, we advocate for regular Core Team meetings (some clients want to meet weekly, others bi-weekly or monthly, and still others want to step up the schedule at certain times of the project. CliffordMoss allows for all of that). We are big believers in using the full spectrum of communications channels to accelerate progress outside of Core Team meetings – including conference calls and Zoom meetings, regular emails, phone appointments, etc. We strive to be 100% accessible to you.

Our Commitment to You: CliffordMoss will work with you to make prudent and smart decisions that position you effectively. YOU will always be in the driver's seat about all budget-related decisions. Our management plan focuses on YOU and YOUR needs. Our choice of assigned team members and sub-consultants is deliberate – we choose peak-performing partners to ensure the very best results.

4. Project Team

Here is the team you will be working with if you choose CliffordMoss:

Laura Crotty, Vice President, CliffordMoss, Chief Strategist Dedicated to Your Project.

Laura specializes in guiding local public initiatives for special districts, education, transportation, environmental, county and city public communications efforts and campaigns. **In November 2020, she is proud to have accomplished a 100% win rate, driving key ballot initiatives** (including a special Library district) to success throughout California. A native of the San Francisco Bay Area, Laura attended UC Santa Cruz, receiving her B.A. in Environmental Studies. Following graduation from UCSC, she became a Senior AmeriCorps team leader ‘filling the gap’ in inner-city public schools and working to improve neighborhoods in Harlem, NYC. Later, she worked with Spectrum Community Services in Hayward, California, improving energy efficiency for low-income homes and vulnerable populations in Alameda County. Laura understands districts and organizations well and brings exceptional skills and experience in research, analysis, information technology and innovative problem-solving to CliffordMoss and our clients. Her favorite pastimes include exploring the great outdoors, especially Tahoe, and fine tuning her violin skills.

Bonnie Moss, Principal, CliffordMoss. Principal Dedicated to Your Project.

Bonnie is a 35+-year veteran of successful local public initiatives, political campaigns and public sector marketing programs that have created impact and winning results across hundreds of communities in California and the nation. Over the past 20+ years, she has earned a reputation as one of California’s leading local revenue measure and public sector strategic communications experts, guiding must-win projects to success. A native of California, she attended MIT and Wellesley College, graduating from Wellesley with a BA in Urban Studies. Bonnie’s consulting career was built on a foundation of 17 years in private sector community relations leadership positions in California and Texas, and eight years as a local elected official in Alameda County, CA. In 1999, Bonnie moved into political and communications consulting where she found enormous success combining her personal and professional passions. After over a decade of successes in the industry, she formed CliffordMoss in 2012 with partner Tom Clifford. Bonnie has guided hundreds of tough-to-win local elections to political success over the past 20+ years, securing billions of dollars for worthy community causes. **Her successes include numerous winning special district and special issue measures.** Clients describe Bonnie as smart, pragmatic, and relentlessly focused on the story needed to WIN with integrity – even in the most challenging environments; she describes herself as a “free spirit” whose lifelong success story is enriched finding win-win solutions for both clients and communities. Aside from guiding and celebrating her clients’ hard work building lasting support for their causes, Bonnie lives (and thrives) in Hayward, California.

CliffordMoss Support Team and Peak Performing Sub Vendors. Our firm employs a team of professionals, who possess important community organizing, campaign, messaging, media, online and social media expertise, and extensive print/production/direct mail capabilities. Our extended team of sub-vendors includes a world-class graphic designer, best in the business print-production teams, experienced data services provider, innovative online communications firms, and media consultants. We foster positive working relationships with vendors that share our commitment to excellence and innovation for CliffordMoss clients. Together, we can successfully navigate your communications challenges and opportunities.

6. Proposed Fees

Our fee structure is **specifically designed** to bring the very best strategic guidance to you to achieve YOUR strategic and electoral objectives, while also meeting predictable and prudent cost control requirements. Our clients tell us the investment in CliffordMoss is well worth it, given our record of doing the job once, doing it right, and getting it done.

Here is our cost proposal for Rancho Murieta Community Service District:

CliffordMoss Fee: **\$6,500/month** – Professional Consulting Fee
Plus approved business expenses

Preliminary PROGRAM Budget. You should expect that a program budget for community engagement and outbound public information will be necessary. Our commitment is to keep your budget as tight as possible. We will collaborate with you to build a public information budget that works for you. Below, is a preliminary recommended program budget:

Rancho Murieta Community Services District – Preliminary Program Budget
~5,000 voters in ~2,500 houses

Stakeholder Communications	Best: Cost
<p align="center">Direct Mail/Collateral ALL voter households (HH) only ~5,000 Voters in ~2,500 HH</p> <p>Estimates = all costs, e.g. copywriting, design, print, mail house + postage.</p>	<p align="center">Not to Exceed \$10,500</p> <p align="center">3 Mailers</p> <ol style="list-style-type: none"> 1. 2-Way CM Mailer 2. Report Back Mailer 3. Info-ONLY Mailer
<p align="center">Online Ad Package ALL voters only (~5,000 Voters)</p>	\$9,500
<p align="center">Video Shoot & Production</p>	\$10,000
<p align="center">Miscellaneous Expenses (including but not limited to a telephone town hall, virtual town hall, copies, etc.)</p>	\$5,000
PROGRAM TOTAL =	\$35,000

This is a preliminary budget. These are estimates only. All figures subject to change based on real-time conditions. We don't spend money frivolously. If we don't use resources in one area, we may reallocate them to another.

7. Thank You!

The CliffordMoss team is eager to assist Rancho Murieta Community Services District in achieving your strategic and electoral goals. Our experience in your region has helped us prepare to effectively serve you. If you have any questions, please do not hesitate to contact Laura Crotty and/or Bonnie Moss.

It all starts with a story – your story. Our job is to bring that story to life. On behalf of the whole CliffordMoss team, we appreciate the opportunity to participate in your process and we hope you share our enthusiasm for **letting us tell your story.** Thank you for your consideration.

Appendix

City of San Leandro (November 2020)

When times are tough and the stakes are high, how do you keep your community with you? One CliffordMoss 2020 client, the **City of San Leandro**, stands out. **In the middle of COVID-19**, with fractured politics, social unrest and a historic, contentious Presidential election, the City of San Leandro knew it had to peak perform in the public engagement space with a challenging measure heading to the 2020 ballot. Teaming up with CliffordMoss and employing a smart strategy, the City launched an effort to engage its community about a ballot measure critically important to the city's future. Operating strictly in the "information ONLY" lane with facts, candor and transparency, **the City's strategy worked**. How did San Leandro leaders navigate to keep their community with them – especially during pandemic conditions? **Here are 5 takeaways:**

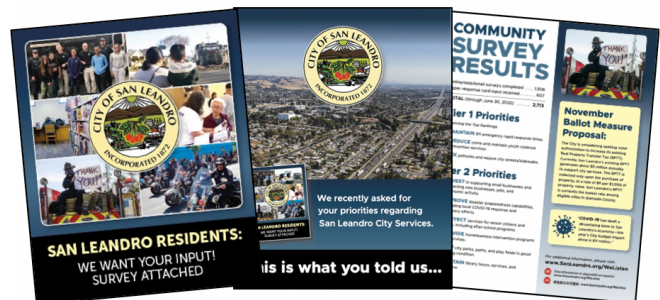


1. Get clear on your goal and your "why" - BEFORE engaging your community.

The City of San Leandro had worked hard in recent years (and even harder during the pandemic) to maintain essential city services in an era of diminishing resources and rising demands. Like most California cities, San Leandro had been forced to tighten its belt and control costs. But even with those efforts, it wasn't enough to protect city leaders from hard financial choices exacerbated by COVID-19. The pandemic was trending to deal a significant blow to city services. To close the funding gap, City Staff had to think outside the box and evaluate a new set of options. A deeper dive into the data revealed that the best option was the idea of securing a modest increase to San Leandro's existing Real Property Transfer Tax (RPTT). To validate assumptions and because they knew they would be asked by skeptics, city leaders prepared supporting analytics for the preferred option to bring to the community. Anticipating tough questions, concerns and challenges BEFORE going public helped the City get that much more prepared.

2. Build a story that people can understand.

With COVID in full effect, it wasn't an easy time to bring an unwanted financial dilemma to the community. Even so, this city team never shied away from the challenge. With CliffordMoss by its side, the City built its story to be both accurate and compelling. The city manager worked hard to focus on facts, candor and transparency. "Like most local communities, COVID-19 has significantly impacted our local economy. Our evaluation has projected a considerable loss in revenue, estimated at \$11 million for 2020 alone..." he declared. This was funding the City counts on to provide city services - *services that local residents expect and deserve*. "Our goal," he said, "is to keep San Leandro moving forward in these challenging times and to remain fiscally strong." Bottom line, the story was relevant and clear: there's a problem....here's what happens if we don't address itand we're working to find an affordable solution. Most important, every conversation, mailer, and communicate telling THIS story would also include 4 simple words: **"What do you think?"**



3. Ask your community for input - and make time to LISTEN.

Making time to engage and LISTEN to the public **takes time** and it isn't always easy. In the midst of navigating a host of turbulent community issues, City Staff understood that seeking and listening to community input could help facilitate an affordable solution and keep the community with them. The successful strategy employed opinion leader conversations, direct mail, online ads, and videos featured on the City's website, YouTube channel, and social media featuring the city manager and mayor telling the City's story. At every turn, there was a direct invitation to provide public input. And as every response was received, it was reviewed by a member of the City's leadership team.

4. Show your Community that You're in Alignment with Them.

Ironically, in the middle of the pandemic, more people than ever before were home and more available to weigh in on issues of community importance. This was true for both professional polling as well as for community listening work that CliffordMoss and the City coordinated together. Among our many community listening strategies was a two-way mailer asking for residents' feedback, which garnered a massive response from the San Leandro public. Comments received made clear that the City's potential measure would face opposition if it was too difficult to understand or unclear where the money would go. Professional polling reinforced those concerns. So the City LISTENED and made adjustments to align to the "sweet spot" between what their preferred (higher cost, more ambitious) package was and what public feedback revealed that the community would support. The final ballot measure was less than what the City originally wanted, but still had potential to earn the level of community support needed to pass at the ballot box (during a pandemic!).



5. Keep Communicating.

Once a ballot measure was finalized, the City took the deliberate step to **keep communicating**, providing information ONLY in all directions. (Reminder: public agencies are only permitted to provide neutral, factual information once a measure has qualified for the ballot. Advocacy on the part of public agencies is not allowed). "To close the funding gap, the City has evaluated various options," the city manager wrote, providing facts only. "One option that won't impact residents' daily cost of living is to secure a modest increase to our existing Real Property Transfer Tax (RPTT)," he added. Making the change would require a vote of the people he noted, alerting them to expect to see the measure on the upcoming ballot. Additional factual communications were distributed via US mail, City website, social media and online advertising during this window to remind voters that the local measure needed their attention. The City wisely understood that abundant factual communication would be important, especially given that its measure landed at the very bottom of an exhaustively long Presidential ballot at a time when people were already suffering from "pandemic fatigue."



In the end, this 5-point public engagement strategy worked. The final election result for San Leandro's Measure VV was 53.28% YES, three points above the 50% threshold needed for passage. The hard work

invested by City leaders had paid off and they were pleased to announce to residents that passage of VV would help protect vital services and keep the city moving forward. **Job well done City of San Leandro!**



Case Study: East Contra Costa County Fire Protection District

The East Contra Costa Fire Protection District (ECCFPD) is a fire district located in the Eastern part of the San Francisco Bay Area facing a massive under-funding problem. Serving a community of 140,000 residents across 249 square miles, the District currently operates just three fire stations (it should have nine!), with a total of only nine firefighters on duty at any given time. The problem: exponential growth in recent years without sufficient public funding, making the need for additional resources great and growing in a new era of wildfires, climate change, and now the COVID-19 pandemic.

CliffordMoss was hired to help ECCFPD to tell its story and assist in preparing to go to the ballot with a local revenue measure (after multiple failed attempts in the past). Our job: provide strategic communications services to build awareness of ECCFPD needs while also helping ECCFPD get “election-ready” for a winning local revenue measure.

To build an effective plan CliffordMoss started with research, calling upon a qualified polling firm to conduct a public opinion poll among local voters to inform the strategy. Armed with this revealing insight, we then built a detailed 29-page Public Engagement Plan with input from District leaders, laying out a customized strategy.

Our comprehensive and far-reaching communications program became known as the “We are Listening” Campaign. Key components included:

- A pocket-size “palm card” including brochure and informational postcards
- Community surveys
- Online ads and earned media
- A video series (7 short specific-topic videos, each less than 4 minutes, and a heart-felt “A Day in the Life of the East Contra Costa Fire Protection District” that could be easily viewed and shared online)
- An active social media presence and extensive “listening activities” using proven CliffordMoss tools.



Video



Online PSA Package



When our face-to-face community outreach was impacted by COVID-19, we pivoted to virtual meetings. Facebook Live was used to deliver outbound messaging and answer questions in real-time. This allowed residents to quickly share the Live sessions with friends, family, relatives and community members. These Facebook Live events would average over 10,000 people reached and 237 engagements.

Townhalls with a 30-minute presentation would provide in-depth explanation and a space for residents to ask questions. As we continued to provide more information, it became clear what the residents needed to see and hear to better understand the severe lack of funding the Fire District was facing. The diligent and extensive community outreach not only helped increase community understanding, but it led to transparency and more importantly public TRUST!



In the end the strategy worked, and awareness grew ... but so did political complexities. Most significantly and much to everyone's surprise, conditions changed late in 2020 to the point where a comprehensive **consolidation of multiple fire districts within the county** emerged as a viable solution to the under-funding problem for ECCFPD. The consolidation planning process is now in motion, and it will fortunately avoid the need for a new ECCFPD local tax measure. *(To Be Continued as events unfold!)*

Exhibit 2. The CliffordMoss Promise

As you deliberate, please keep in mind our core promises to you:

1. ACTIVE LISTENING. In this day and age, it often feels like *listening* is a lost art. Many consultants tell you exactly what you should do without ever getting to know who you are and what makes you and your cause unique. Our team is different. We will MAKE TIME to listen - in all directions. From our very first meeting, you will see that many of our diagnostic tools involve effective listening – listening to you, listening to public leaders and listening to stakeholders, influencers and voters who can impact your end-game goals. Providing effective assistance STARTS with quality listening.

2. EARNING PUBLIC TRUST. The most successful strategic plans earn the confidence of people because they had a role in helping to create them. We believe “people support what they help create” and practice that in our strategic work together. This involves setting up channels for candid, two-way exchange with stakeholders every step of the way, and being open to going, within a framework, in the direction they want to go.

3. CANDOR. In our business, candor is a virtue. That’s why we strive to build a working environment where all parties have room to be authentic and real. Avoiding or sugarcoating tough issues doesn’t help. When we all commit to candor in a spirit of goodwill, we keep your path to success open.

4. WORK ETHIC. Our experience reminds us that a highly complex, resource-tight project like yours requires dedicated effort from all invested parties. Our work ethic will be an asset to you. We believe in personal investment, hard work, discipline, easy and frequent flow of information and continuous improvement in the work we do together. We practice these values in all aspects of our work, from logistical and analytical elements, to resolving community concerns, to developing policy, program and project options. We commit ourselves 24/7.

5. CONSULTANT ACCESSIBILITY. Our team is comfortable leading (and following) in a high pressure, fast-paced environment. You can count on us to be with you from start to finish. You will have seasoned professionals at your side; we will not hand your project off to junior level staff. When you need us, you will have the capability to reach us — quickly.

6. PASSION FOR YOUR CAUSE. We love the public engagement work we do for California public districts. Leading members of our team have been practicing professionals for years. When you succeed, we succeed – that’s what motivates us to help you hit a grand slam. Our passion for the work helps us to go deeper with clients. Call our references – ask how they feel about our CliffordMoss commitment to their cause.

It all starts with a story – YOUR story. Our job is to help you bring **your story** to life. Let us put the CliffordMoss Promise to work for you. ***Let us tell your story. Thank you!***