



## **RESCUE UNION SCHOOL DISTRICT**

2390 Bass Lake Road Rescue, CA 95672 (530) 677-4461 / FAX (530) 677-0719  
[www.rescueusd.org](http://www.rescueusd.org)

### **BOARD OF TRUSTEES STUDY SESSION MINUTES**

Tuesday, September 26, 2023  
Rescue District Office Boardroom

The Public's health and well-being are the top priority for the Board of Trustees of the Rescue Union School District and all are urged to take appropriate health safety precautions. To facilitate this process, there were two options to view and/or participate in this open session meeting in person or via Zoom.

#### **DISTRICT MISSION**

Rescue Union School District, in partnership with families and the community, is dedicated to the success of every student by providing a challenging, comprehensive and quality education in a safe environment in which all individuals are respected, valued, connected and supported.

#### **PLEASE NOTE:**

These are provided as summary minutes. The audio recording of the meeting is available by request.

**CALL TO ORDER:** Board president called the meeting to order at 5:33 p.m.

#### **ROLL CALL:**

- ✓ Michael Gordon, President  
Kim White, Vice President
- ✓ Michelle Bebout, Clerk
- ✓ Jamie Hunter, Member  
Michael Flaherty, Member
- ✓ Jim Shoemake, Superintendent and Board Secretary

#### **OPEN SESSION:**

Convened open session in the Boardroom at 5:33 p.m.

Welcome - The Board vice president provided an introduction to Board meeting proceedings.

Flag Salute - Board vice president led the flag salute.

1. Adoption of Agenda

(Consideration for Action)

Trustee Bebout moved and Trustee Hunter seconded to approve the agenda as presented. Motion passed 3-0.

**PUBLIC COMMENTS:**

There were no public comments.

**GENERAL:**

2. Celebrating Excellence in Our Community

(Presentation)

The Superintendent presented Jackson Principal Michele Williamson, Jackson Elementary Parent Teacher Organization (PTO), El Dorado County Office of Education (EDCOE), El Dorado Hills Community Services District (EDHCSD), The Latrobe Fund, Walk With Austin, The KYA Group, and Valerie and Andrew Meyers with a Proclamation recognizing their exemplary service to the Jackson Elementary and regional community in funding and facilitating the county's first All Abilities Playground.

The Board took a short recess of 20 minutes to allow the sponsor groups to be honored in the Boardroom.

**BUSINESS AND FACILITIES:**

3. Facilities Department Presentation

(Presentation)

The Facilities and Maintenance Director, Brandon Page, presented a Facilities Department update. This report included facility projects that our team completed over summer 2023 and a few that are currently in progress.

4. Facilities Master Plan

(Presentation)

Ken Reynolds from SchoolWorks, Inc. presented a Facilities Master Plan Update. This plan included a comprehensive facility needs assessment, enrollment projections and stakeholder input.

**ADJOURNMENT:** Trustee Bebout moved to adjourn the meeting at 7:22 p.m.

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Michelle Bebout, Clerk

Date

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Michael Gordon, President

Date



## **RESCUE UNION SCHOOL DISTRICT**

2390 Bass Lake Road Rescue, CA 95672 (530) 677-4461 / FAX (530) 677-0719

[www.rescueusd.org](http://www.rescueusd.org)

### **BOARD OF TRUSTEES REGULAR MEETING MINUTES**

Tuesday, November 14, 2023 - 6:30 p.m. Open Session  
Rescue District Office Board Room

The Public's health and well-being are the top priority for the Board of Trustees of the Rescue Union School District and all are urged to take all appropriate health safety precautions. To facilitate this process, there were two options to view and/or participate in this open session meeting in person or via Zoom.

#### **DISTRICT MISSION**

Rescue Union School District, in partnership with families and the community, is dedicated to the success of every student by providing a challenging, comprehensive and quality education in a safe environment in which all individuals are respected, valued, connected and supported.

#### **PLEASE NOTE:**

These are provided as summary minutes. The audio recording of the meeting is available for review at:

<http://www.rescueusd.org/School-Board/Agendas-Minutes/index.html>

**CALL TO ORDER:** Board president called the meeting to order at 5:00 p.m.

#### **ROLL CALL:**

- ✓ Michael Gordon, President
- ✓ Kim White, Vice President
- Michelle Bebout, Clerk
- ✓ Jamie Hunter, Member
- ✓ Michael Flaherty, Member
- ✓ Jim Shoemake, Superintendent and Board Secretary

#### **PUBLIC COMMENT:**

(Closed session agenda items only)

There were no comments concerning items on the Closed Session agenda.

## **CLOSED SESSION:**

The Board adjourned to closed session to discuss matters of personnel, security, negotiations, student discipline, litigation, or other matters as authorized by Government Code Sections 3549.1, 54956.9, 54956.8, 54957, and 54957.6 and Education Code Sections 35146 and 48918.

Conference with Labor Negotiator - Discussion with the District's Superintendent, Jim Shoemake, and/or labor negotiators, Lisa Donaldson and Dustin Haley, regarding directions and issues in negotiations with Rescue Union Federation of Teachers (RUFT), California School Employees Association (CSEA), Confidential Staff, and Administrative Management.

## **OPEN SESSION:**

Convened open session in the Boardroom at 6:31 p.m.

Welcome - The Board president provided an introduction to Board meeting proceedings.

Flag Salute - Board president led the flag salute.

### **1. Adoption of Agenda**

(Consideration for Action)

Trustee White moved and Trustee Hunter seconded to adopt the agenda as presented. Motion passed 4-0.

## **REPORTS AND COMMUNICATION:**

Report from Closed Session - Board president reported no action taken in closed session.

Superintendent's Report - The Superintendent presented a report on Bright Spots happening within the district, specifically student experiences with unique lesson plans such as hands-on experiments in science, special speakers invited to sites for presentations on literature and authorship, educational visits by local law enforcement, group performances with music and dance, garden events in the District's growing outdoor spaces program, holiday celebrations and extracurricular activities. Also highlighted were student-led gatherings, art and enrichment classes and opportunities for athletic engagement.

There were no public comments.

National School Psychology Week Proclamation - Superintendent Shoemake presented a proclamation, read aloud by the Board vice president, stating Rescue Union School District recognizes the week of November 6-10, 2023 as National School Psychology Week.

There were no public comments.

## **GENERAL:**

### **2. RUSD Garden/Outdoor Learning Spaces Update**

(Information Only)

The Superintendent recommended the Board hear a presentation from Lead Garden Coordinator Gina Johnston, who gave an update on gardens and outdoor learning spaces across the district.

There were no public comments.

## **CURRICULUM AND INSTRUCTION:**

### **3. CAASPP Update (Overall and Subgroup Results)**

(Information Only)

The Superintendent recommended the Board hear a presentation on test results for the 2023 administration of Smarter Balanced Assessments from California Assessment of Student Performance and Progress (CAASPP) Assistant Superintendent of Curriculum and Instruction Dustin Haley provided the report.

There were no public comments.

## **BUSINESS AND FACILITIES:**

### **4. Annual/5 Year Developer Fee Report**

(Consideration for Action)

The Superintendent recommended the Board adopt the Accounting of Developer Fees for Fiscal Year 2022-23 Report. Pursuant to Government Code Section 66000 et seq. the District is required to make public an annual accounting of developer fees collected by the District within 180 days after the last day of each fiscal year. Assistant Superintendent of Business Services Lisa Donaldson provided the report.

There were no public comments.

Trustee White moved and Trustee Hunter seconded to approve the Annual/5 Year Developer Fee Report as presented. Motion passed 4-0.

### **5. Human Resources Job Description Titles**

(Consideration for Action)

The Superintendent recommended the Board adopt the updated Human Resources Department Job Description titles. Assistant Superintendent of Business Services Lisa Donaldson provided the report.

There were no public comments.

Trustee Hunter moved and Trustee Flaherty seconded to approve the Human Resources Job Description Titles. Motion passed 4-0.

### **6. Certificated Staff - RUFT Tentative Agreement AB1200 Compliance 2023-2024 (Consideration for Action)**

The Superintendent recommended the Board approve the Tentative Agreement and School District Public Disclosure of Negotiated Agreement AB1200 Compliance for Certificated Staff. Assistant Superintendent of Business Services Lisa Donaldson provided the report.

There were no public comments.

Trustee Flaherty moved and Trustee White seconded to approve the Certificated Staff - RUFT Tentative Agreement and AB1200 Compliance 2023-2024. Motion passed 4-0.

7. Management, Confidential and Administration including the Assistant Superintendents and Superintendent (Unrepresented) - Tentative Agreement AB1200 Compliance 2023-2024 (Consideration for Action)

The Superintendent recommended the Board approve the School District Public Disclosure of Negotiated Agreement AB1200 Compliance for Management, Confidential and Administration (Unrepresented).

Assistant Superintendent of Business Services Lisa Donaldson provided the report.

There were no public comments.

Trustee Hunter moved and Trustee White seconded to approve the Management, Confidential and Administration including the Assistant Superintendents and Superintendent (Unrepresented) - Tentative Agreement AB1200 Compliance 2023-2024. Motion passed 4-0.

**CONSENT AGENDA:**

All matters listed under Consent Agenda are considered to be routine or sufficiently supported by prior or accompanying reference materials and information as to not require additional discussion. A motion as referenced below enacts all items. The Board President called for public comment on any of the items on the consent agenda. There were no public comments. Trustee White moved to pull Consent Item #8, Board Meeting Minutes for the Sept. 26, 2023 Study Session, and bring this item back for Board approval at the next Regular Board Meeting in December. Trustee White moved and Trustee Hunter seconded to approve all remaining items, 9-15, on the Consent Agenda. Motion passed 4-0.

- 8. Board Meeting Minutes - Minutes of the Sept. 26, 2023 Board Study Session Meeting (Materials Provided)
- 9. Study Session Minutes - Minutes of the Oct. 10, 2023 Regular Board Meeting (Materials Provided)
- 10. Board Meeting Minutes - Minutes of the Oct. 24, 2023 Board Study Session (Materials Provided)
- 11. Human Resources - the District's long-range goal is to recruit a diverse, high quality staff with student focused goals and philosophies. Periodically, changes in staffing occur due to need for additional positions, resignations, or leaves of absence. All positions listed are within current budget allocations (Materials Provided)
- 12. District Expenditure - Warrants must regularly be presented to the Board of Trustees for ratification. Detailed warrant order listings are available at the District Office. The supplement reflects expenditures from Oct. 1, 2023 - Oct. 31, 2023 (Materials Provided)
- 13. District Purchase Orders - Purchase orders must regularly be presented to the Board of Trustees for ratification. The supplement reflects expenditures from Oct. 1, 2023 - Oct. 31, 2023 (Materials Provided)
- 14. Technology Dept. E-Waste Report (Materials Provided)
- 15. Overnight Field Trip Request to Coloma Outdoor Discovery School for Lake Forest (Materials Provided)

**ADJOURNMENT:**

Trustee White moved to adjourn the meeting at 8:44 p.m.

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Michelle Bebout, Clerk

Date

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Michael Gordon, President

Date

**RESCUE UNION SCHOOL DISTRICT**

**AGENDA: Certificated Personnel**

**RECOMMENDATION:**

The Superintendent recommends the Board approve the following personnel actions.

**BACKGROUND:**

Periodically changes in administrative staffing occur due to hiring, promotions, resignations or requests for leaves of absence. The Board must formally approve these requests.

**STATUS:**

The following certificated personnel changes are listed on the agenda.

Name	Personnel Action	Positi on FTE	Position	School or Dept.	Effective Date
Faubert, Emily	Employment, Temp	1.0	Teacher	Pleasant Grove	12/4/2023

**FISCAL IMPACT:**

Fiscal impact will be reflected in the 2023-2024 budget.

**BOARD GOALS:**

Board Focus Goal IV - STAFF NEEDS

Attract and retain diverse, knowledgeable, dedicated employees who are skilled and supported in their commitment to provide quality education for our students.

**RESCUE UNION SCHOOL DISTRICT**

**AGENDA ITEM: Classified Personnel**

**RECOMMENDATION:**

The Superintendent recommends the Board approve the following personnel actions.

**BACKGROUND:**

Periodically changes in classified staffing occur due to hiring, resignations or requests for leaves of absence. The Board must formally approve these requests.

**STATUS:**

The following classified personnel changes are listed on the agenda:

Name	Personnel Action	Position FTE	Position	School or Dept.	Effective Date
Pendygraft, Christina	100% unpaid LOA	.39	Instructional Assistant – Title 1	Rescue	1/16/2024
Fernandez, Felicia	Employment	.44	Instructional Assistant – TK	Jackson	11/27/2023
Kesner, Stacey	Employment	.052	Yard Supervisor	Rescue	11/27/2023
Neel, Christine	Employment	.75	Instructional Assistant – SDC	Pleasant Grove	11/27/2023
Stoddard, Maggie	Employment	.44	Instructional Assistant – TK	Rescue	11/14/2023
Gamble, Tammy	Resignation	.75	II Facilitator	Green Valley	11/30/2023
Mastoor, Farooqa	Resignation	.375	Yard Supervisor	Lake Forest	11/30/2023
Morgenstern, Lori	Resignation	.44	Instructional Assistant – TK	Jackson	11/10/2023

**FISCAL IMPACT:**

Fiscal impact will be reflected in the 2023-2024 budget years.

**BOARD GOAL:**

Board Focus Goal IV – STAFF NEEDS:

Attract and retain diverse, knowledgeable, dedicated employees who are skilled and supported in their commitment to providing quality education for our students.





Vendor/Addr Remit name Req Reference Date Description	Tax ID num	Deposit type FD RESC Y OBJT GOAL FUNC LC1 LOC2 L3 SCH T9MPS	ABA num Account num	EE ES Liq Amt	E-Term E-ExtRef Net Amount
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102973/00 PROPACIFIC FRESH  
PO BOX 1069  
DURHAM, CA 95938

245017 PO-240009 11/07/2023 7045395

1	13-5310-0-4710-0000-3700-000-0000-00-000 NN P	595.95 *	595.95	595.95	595.95
TOTAL PAYMENT AMOUNT					

106469/00 SIGNAL SERVICE INC  
PO BOX 597  
ANGELS CAMP, CA 95222

245311 PO-240308 11/08/2023 377569

1	01-8150-0-5806-0000-8110-085-0000-00-000 NN P	250.00 *	250.00	250.00	250.00
TOTAL PAYMENT AMOUNT					

003783/00 SYSCO - SACRAMENTO  
P O BOX 138007  
SACRAMENTO, CA 95813-8007

245574 PO-240560 11/13/2023 431722457

1	13-5310-0-4710-0000-3700-000-0000-00-000 NN P	260.60 *	260.60	260.60	260.60
TOTAL PAYMENT AMOUNT					

105690/00 THE LION ELECTRIC CO USA  
4522 PARKER AVE  
BUILDING 700 SUITE 350  
MCCELLELLAN PARK, CA 95652

245208 PO-240190 11/08/2023 IN-CA2000714

1	01-0842-0-4360-0000-3600-083-0000-00-000 NN P	1,907.98 *	1,907.98	1,907.98	1,907.98
TOTAL PAYMENT AMOUNT					

005634/00 YOUNGDAHL CONSULTING GROUP INC  
1234 GLENHAVEN COURT  
EL DORADO HILLS, CA 95762-000

245496 PO-240502 10/31/2023 83384 OCT

1	35-0000-0-5806-0000-8500-020-0000-00-000 NN P	3,891.25 *	3,891.25	3,891.25	3,891.25
TOTAL PAYMENT AMOUNT					

Pursuant to Rescue Union School District Policy, the El Dorado County Superintendent of Schools is hereby authorized and directed to issue individual warrants to the payees named hereon.

  
District Designee Date

TOTAL BATCH PAYMENT	48,505.81 ***	0.00	48,505.81
TOTAL DISTRICT PAYMENT	48,505.81 ****	0.00	48,505.81
TOTAL FOR ALL DISTRICTS:	48,505.81 ****	0.00	48,505.81

Number of checks to be printed: 20, not counting voids due to stub overflows.

48,505.81




Vendor/Addr	Reprint name	Date	Description	Tax ID num	Deposit type	FD RESC Y	OBJT	GOAL	ABA num	Account num	EE ES	E-Term	E-ExtRef
Req Reference											Liq Amt		Net Amount
101652/00	THOMPSON, KECIA												
	(EMPL REIMB)												
	2966 WINDSOR COURT												
	RESCUE, CA 95682												
PV-240422	11/15/2023	SAFEMAY VB PARTY											97.19
PV-240422	11/15/2023	DOLLAR TREE VB PARTY											28.85
PV-240422	11/15/2023	WALMART CHOIRT CANDY RELAY											9.94
		TOTAL PAYMENT AMOUNT											135.98

TOTAL BATCH PAYMENT	69,095.29	***	0.00	69,095.29
TOTAL USE TAX AMOUNT				16.82
TOTAL DISTRICT PAYMENT	69,095.29	****	0.00	69,095.29
TOTAL USE TAX AMOUNT				16.82
TOTAL FOR ALL DISTRICTS:	69,095.29	****	0.00	69,095.29
TOTAL USE TAX AMOUNT				16.82

Number of checks to be printed: 22, not counting voids due to stub overflows.  
 Number of zero dollar checks: 2, will be printed.

Pursuant to Rescue Union School District Policy, the El Dorado County Superintendent of Schools is hereby authorized and directed to issue individual warrants to the payees named herein

 11/15/2023

District Designee Date

Vendor/Addr	Remit name	Date	Description	Tax ID num	Deposit type	ABA num	Account num	EE	ES	E-Term	E-ExtRef
Req Reference					FD RESC Y	OBJT GOAL	FUNC LC1 LOC2 L3 SCH	TPMPS	Liq Amt	Net Amount	

102799/00	WOODWIND & BRASSWIND										
	5795 LINDERO CANYON ROAD										
	WESTLAKE VILLAGE, CA 91362										
245581	PO-240571	10/30/2023	ARINV69052485								
					1 01-6762-0-4300-1110-1000-024-0034-00-000	NN	F		58.98	58.98	58.98
									58.98 *		58.98
					TOTAL PAYMENT AMOUNT						

005634/00	YOUNGDAHL CONSULTING GROUP INC										
	1234 GLENHAVEN COURT										
	EL DORADO HILLS, CA 95762-000										
215358	PO-210340	10/31/2023	83272								
245497	PO-240501	09/30/2023	INV 83223 PG KITCHEN ADDITION		1 35-0000-0-5806-0000-8500-026-3700-00-000	NN	F		569.00	6,770.00	569.00
									6,770.00		6,770.00
					TOTAL PAYMENT AMOUNT				7,339.00 *		7,339.00

TOTAL BATCH PAYMENT 439,425.65 \*\*\* 0.00 439,425.65

TOTAL DISTRICT PAYMENT 439,425.65 \*\*\*\* 0.00 439,425.65

TOTAL FOR ALL DISTRICTS: 439,425.65 \*\*\*\*\* 0.00 439,425.65

Number of checks to be printed: 103, not counting voids due to stub overflows. *2* 439,425.65 *2*

Pursuant to Rescue Union School District Policy, the El  
Dorado County Superintendent of Schools is hereby  
authorized and directed to issue individual warrants to the  
payees named hereon

*[Signature]* 11/9/23  
\_\_\_\_\_  
District Designee Date

0025 11\_02\_2023 LQ BATCH: 0025 0025 11\_02\_2023 LQ << Held for Audit >>

Vendor/Addr	Requit name	Date	Description	Tax ID num	Deposit type	FD RESC Y	OBJT	GOAL	ABA num	Account num	EE	ES	E-Term	E-ExtRef
Req Reference														

105011/00	TEACHER SYNERGY LLC													
	75 REMITTANCE DRIVE													
	DEPARTMENT 6759													
	CHICAGO, IL 60675-6759													
245346	PO-240333	10/26/2023	245662300											
245499	PO-240485	10/10/2023	243663213											

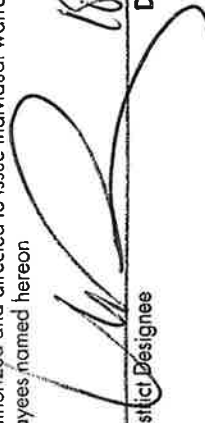
106466/00	TODOROFF, LAUREN													
	(EMPLOYEE REIMBURSE)													
	9025 BRONZEWING PL													
	EL DORADO HILLS, CA 95762													

100001/00	VERIZON WIRELESS													
	P O BOX 660108													
	DALLAS, TX 75266-0108													
245374	PO-240349	10/18/2023	9947192295	SEP 19 - OCT 18										

TOTAL BATCH PAYMENT	82,007.80	***	0.00											
TOTAL USE TAX AMOUNT														
TOTAL DISTRICT PAYMENT	82,007.80	****	0.00											
TOTAL USE TAX AMOUNT														
TOTAL FOR ALL DISTRICTS:	82,007.80	****	0.00											
TOTAL USE TAX AMOUNT														

Number of checks to be printed: 25, not counting voids due to stub overflows.  
 Number of zero dollar checks: 1, will be printed.

Pursuant to Rescue Union School District Policy, the El Dorado County Superintendent of Schools is hereby authorized and directed to issue individual warrants to the payees named herein

 10/31/23  
 District Designee Date

01 GENERAL FUND

P.O.#	VENDOR NAME	DESCRIPTION	AMOUNT	SITE NAMES
240589	2NDGEAR LLC	HoverCams	3,043.76	DISTRICTWIDE SERVICES
240598	AMAZON CAPITAL SERVICES INC	Library Supplies - LF	64.69	DISTRICTWIDE SERVICES
240602	AMAZON CAPITAL SERVICES INC	Tech Supplies - 11/20/23 list	4,917.25	DISTRICTWIDE SERVICES
240595	APPLE COMPUTER INC	325 iPads (grant funds)	105,520.19	DISTRICTWIDE SERVICES
240612	CAHPERD	PE Conference	1,537.00	Rescue School
240592	CAROLINA BIOLOGICAL SUPPLY	To purchase 7th gd Science sup	1,280.66	Pleasant Grove Middle School
240599	CHROMEBOOKPARTS.COM	40 chromebook batteries	1,286.57	DISTRICTWIDE SERVICES
240596	DEMCO INC	Library Supplies	809.55	DISTRICTWIDE SERVICES
240603	EL DORADO COUNTY	Tardy Slips for MV	328.19	Marina Village School
240610	EL DORADO COUNTY	RUSD Job Cards with QR Code	128.70	DISTRICTWIDE SERVICES
240594	FOLLETT CONTENT SOLUTIONS LLC	PG's New Series-Credit Voucher	969.81	DISTRICTWIDE SERVICES
240590	GATEKEEPER SYSTEMS USA INC		850.00	Transportation
240608	IXL.COM	IXL upgrade ELA: grades 7 & 8	4,538.00	DISTRICTWIDE SERVICES
240600	LEARNING PATHWAYS	Psycho-ed. Evals. 2023-24	50,000.00	Student Support Services
240591	NASCO MODESTO	open PO for Tamme Cotenias	5,786.85	Pleasant Grove Middle School
240593	RUSD CONFERENCE	For CAHPERD Conference	5,698.92	Pleasant Grove Middle School
240605	RUSD CONFERENCE	Lunchbox Learning 2023	135.00	Student Support Services
240606	RUSD CONFERENCE	VD Virtual Fall SPED Symp.	135.00	Student Support Services
240607	RUSD CONFERENCE	BH CSNO 2024 Conference	2,013.13	Student Support Services
240613	RUSD CONFERENCE	CSBA Annual Education Conf.	6,000.00	DISTRICTWIDE SERVICES
240614	RUSD CONFERENCE	K. Larsen CAHPERD conference	1,160.00	Marina Village School
240615	RUSD CONFERENCE	ACSA Superintendent Symposium	2,000.00	DISTRICTWIDE SERVICES
240609	SADLIER OXFORD	MV - more vocab wkbs needed	29,500.00	DISTRICTWIDE SERVICES
240611	STEPHEN ROATCH ACCOUNTANCY COR	2023-24 ANNUAL AUDIT	29,060.00	Maintenance
240601	TC LANDSCAPE CONSTRUCTION AND	GV - Playground	29,060.00	DISTRICTWIDE SERVICES
240597	TEXTBOOK WAREHOUSE LLC	Elem SocSt Wkbs- discounted	7,489.05	DISTRICTWIDE SERVICES
240604	UBEO BUSINESS SERVICES	P1 Staples for Canons	215.83	Marina Village School
		TOTAL FUND	258,680.06	
		TOTAL DISTRICT	258,680.06	

FUND		AMOUNT
01	GENERAL FUND	258,680.06
	TOTAL DISTRICT	258,680.06





# 2023 FACILITIES MASTER PLAN



SCHOOLWORKS, INC.





# Facilities Master Plan Goals

The goal of a successful Facilities Master Plan provides administration and stakeholders with the appropriate information to assist in creating a realistic and equitable plan, that is flexible and adaptable to uncertainties.

Our team focuses on developing a plan that not only identifies, defines and prioritizes key maintenance, modernization and new construction projects, but also puts a strong emphasis on timing and availability of future funding at both the State and local level.





# Why should you invest in a Facilities Master Plan

- Engages stakeholders
- Provides a visual representation of the district's goals & objectives
- Outlines both short-term & long-term projects including major modernization, deferred maintenance and new construction
- Plan for future General Obligation Bonds
- Maximize State funding resources & other grants
- Assists design teams such as architects & engineers
- Prepare for future enrollment trends





## The Process

# Questions a Facilities Master Plan should address

1

What are the District's needs?

2

How much will the scope of work cost?

3

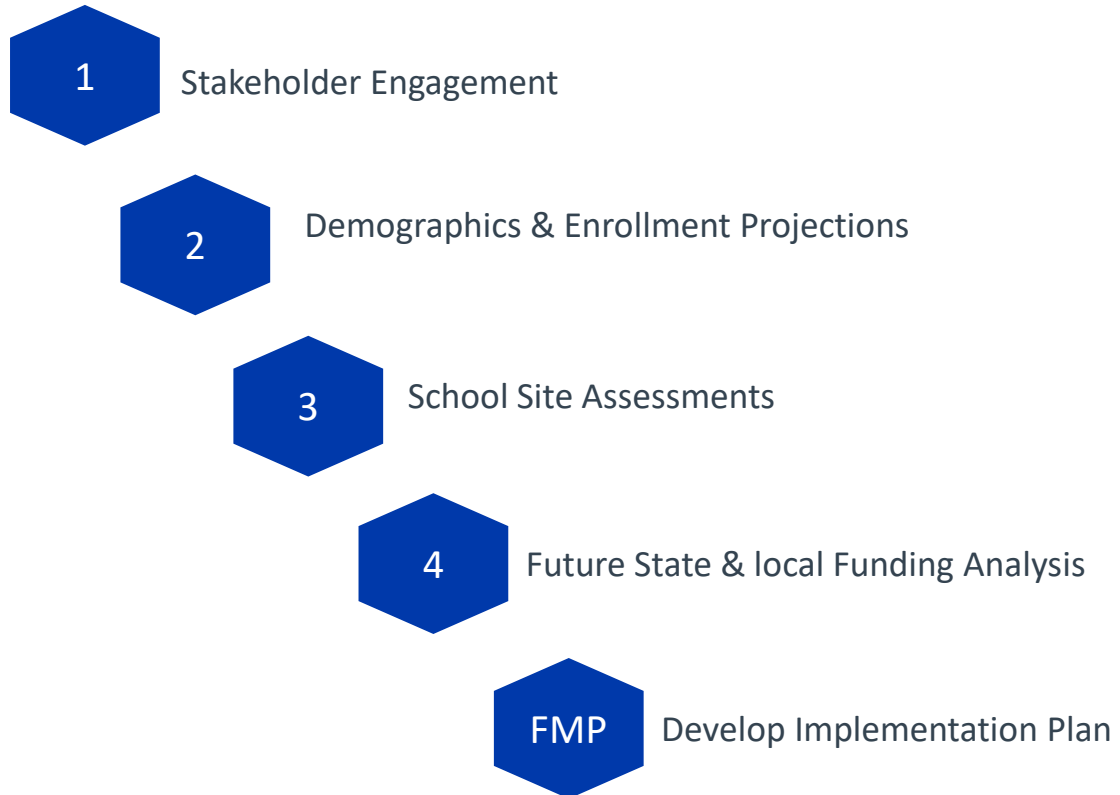
What funding resources are available?

4

When will funding be available?



# The Foundational Cornerstones for Success







## Foundational Cornerstone #1

# Standard Stakeholder Engagement

The Facilities Master Plan process is successful only if the stakeholders understand the planning process and have input into both the district's needs and proposed solution to address those needs

1

Stakeholder introduction Meetings

2

Teacher & staff surveys

3

Staff meeting during site assessment

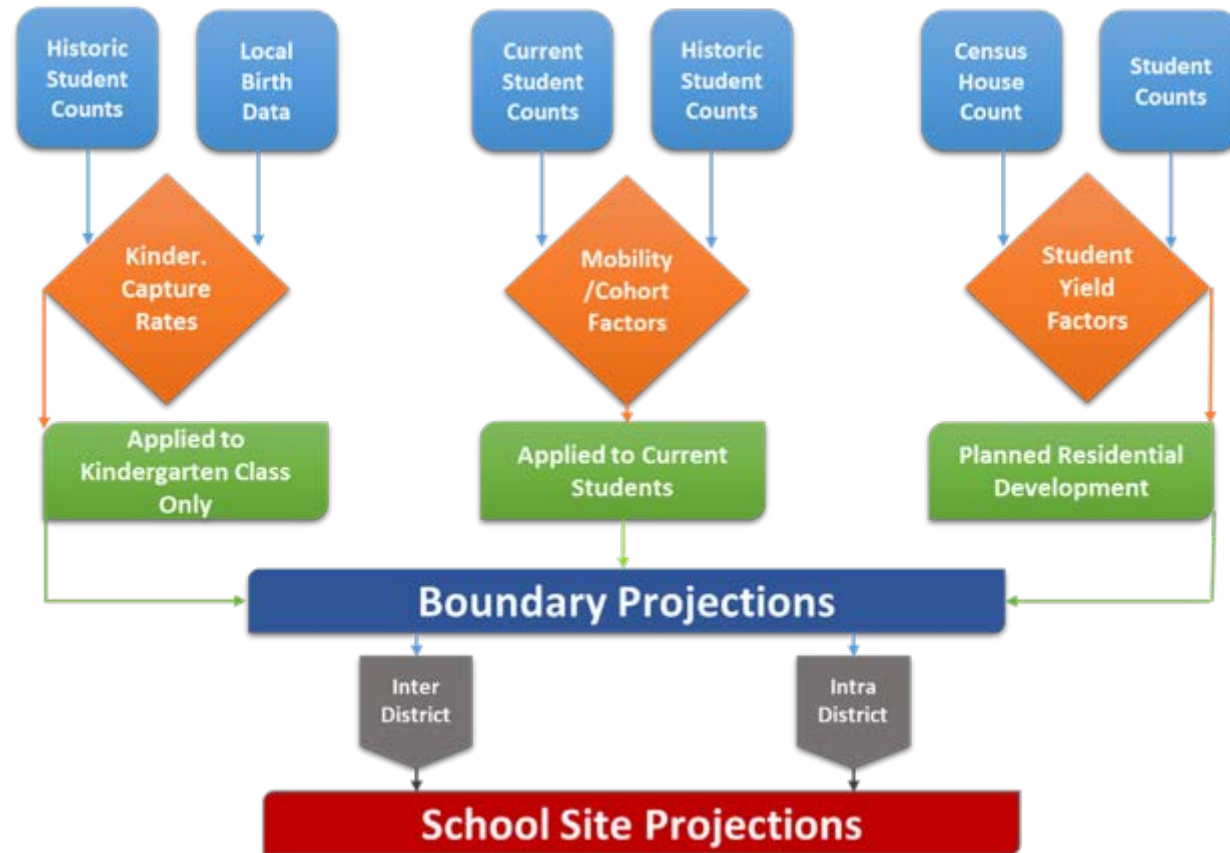
4

Board workshop



## Foundational Cornerstone #2

# Enrollment Projection







## Foundational Cornerstone #3

# School Site Assessments

1

Analyze crucial infrastructure such as HVAC, utilities, roofing, health, safety & security

2

Evaluate the district's current deferred maintenance procedures

3

Assess how facilities accommodate current educational and support programs

4

Do facilities create any negative impacts on students & teachers?

5

Equity of facilities across the district

6

Address future large scale new construction projects

7

Scope of work cost estimates





## Foundational Cornerstone #4

# Future Funding Analysis



### State Funding Options

Modernization Eligibility

New Construction Eligibility

Future Early Learning Grants



### Local Funding Options

Developer Fees

Certificates of Participation (COP)

General Obligation Bonds (G.O.)

Mello-Roos/Community Facilities District (CFD)



### Other funding Options

Deferred Maintenance

RRMA/RMA (Restricted Maintenance Accounts)

Federal Grants





# Green Valley Elementary

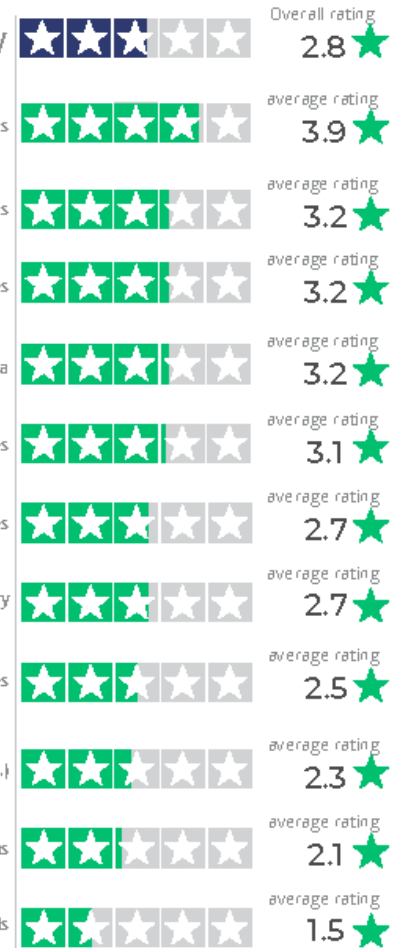




# Stakeholder Engagement



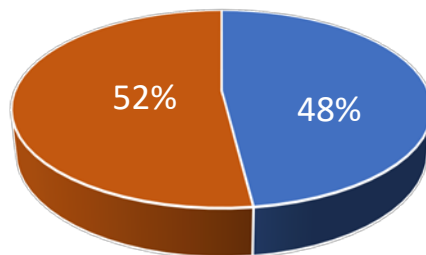
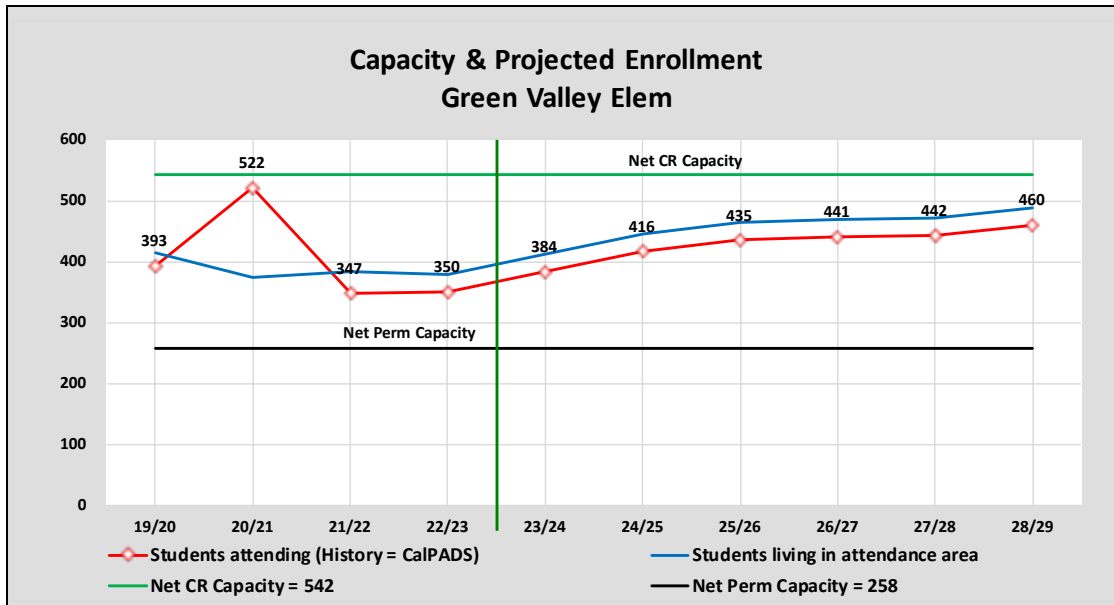
## Green Valley Elementary







# Green Valley Elementary



- Permanent Classrooms
- Portable Classrooms





# Green Valley Elementary



Playfields



Kindergarten Classrooms



D Wing Portables



Portable Buildings

## Future Modernization Projects

Roofing

Utilities

Rehabilitate Playfields

Safety & Security

Flatwork (paving)

Upgrade Technology

Remodel Restrooms

Upgrade Classroom Interior Spaces

## Future New Construction Projects

Shade Structure

Replace Portables with Permanent  
Modular/Permanent New Construction

Master Plan	Cost Estimate
Modernization	\$1,326,520
New Construction	\$8,060,520
Total Cost	\$9,387,040



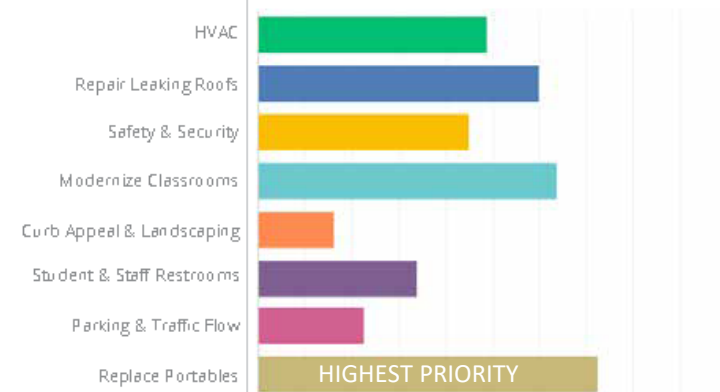


# Jackson Elementary



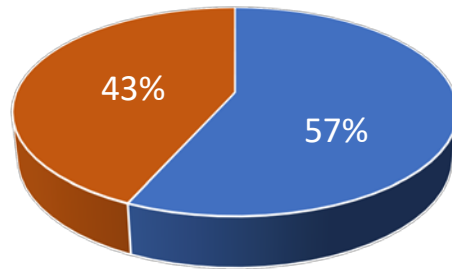
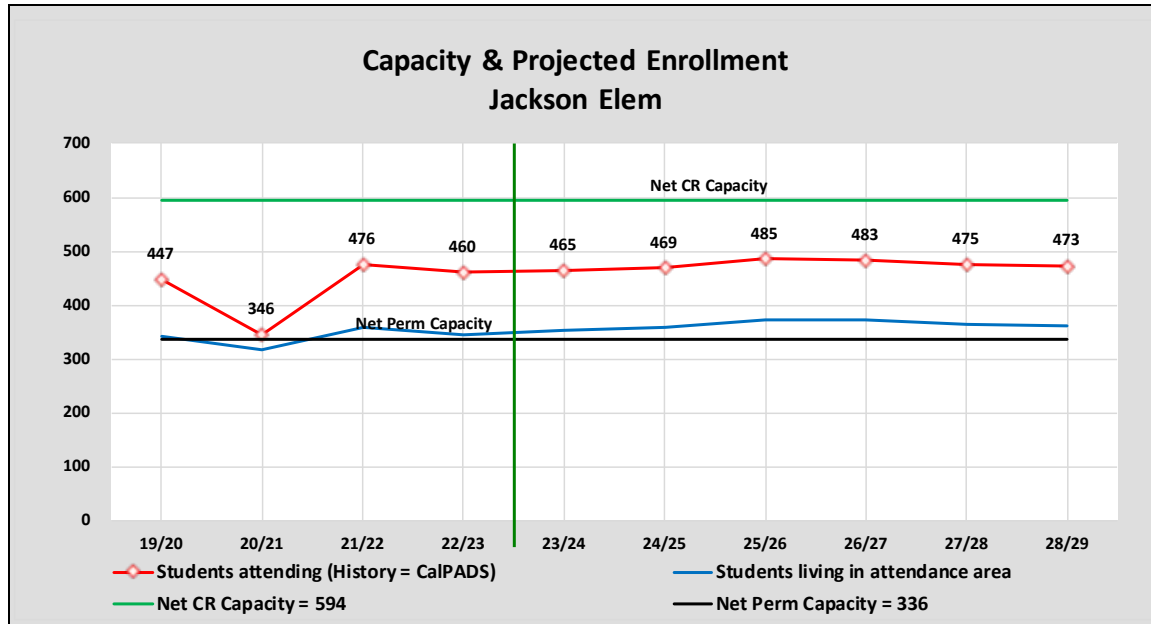


# Stakeholder Engagement





# Jackson Elementary



- Permanent Classrooms
- Portable Classrooms





# Jackson Elementary



Classroom



Water Damage Repair



Portables



Portable

## Future Modernization Projects

Roofing

HVAC

Utilities

Safety & Security

Flatwork (paving)

Upgrade Technology

Remodel Restrooms

Upgrade Classroom Interior Spaces

Exterior Paint & Repairs

## Future New Construction Projects

Shade Structure

Replace Portables with Permanent  
Modular/Permanent New Construction

Master Plan	Cost Estimate
Modernization	\$1,960,166
New Construction	\$11,414,000
Total Cost	\$13,374,166





# Lake Forest Elementary





# Stakeholder Engagement



## Lake Forest Elementary

Overall rating  
2.9 ★

Multipurpose/Cafeteria

average rating  
3.5 ★

Library

average rating  
3.5 ★

Kitchen/Food Services

average rating  
3.3 ★

Staff and Administrative Spaces

average rating  
3.2 ★

General Education Classroom Spaces

average rating  
2.7 ★

Specialized Classrooms (Science, Music, Labs, Etc.)

average rating  
2.7 ★

Student Counseling Spaces

average rating  
2.7 ★

Outdoor Play Equipment, Hardcourts, Playfields

average rating  
2.7 ★

Special Education Classrooms

average rating  
2.5 ★

Restrooms

average rating  
2.5 ★

Physical Education/Indoor Athletic Spaces

average rating  
2.4 ★

HVAC

Repair Leaking Roofs

Safety & Security

Modernize Classrooms

Curb Appeal & Landscaping

Student & Staff Restrooms

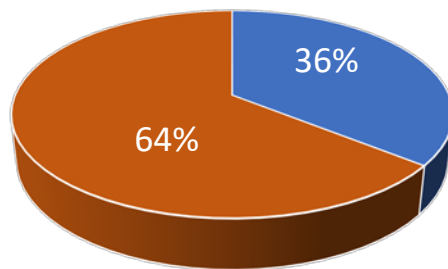
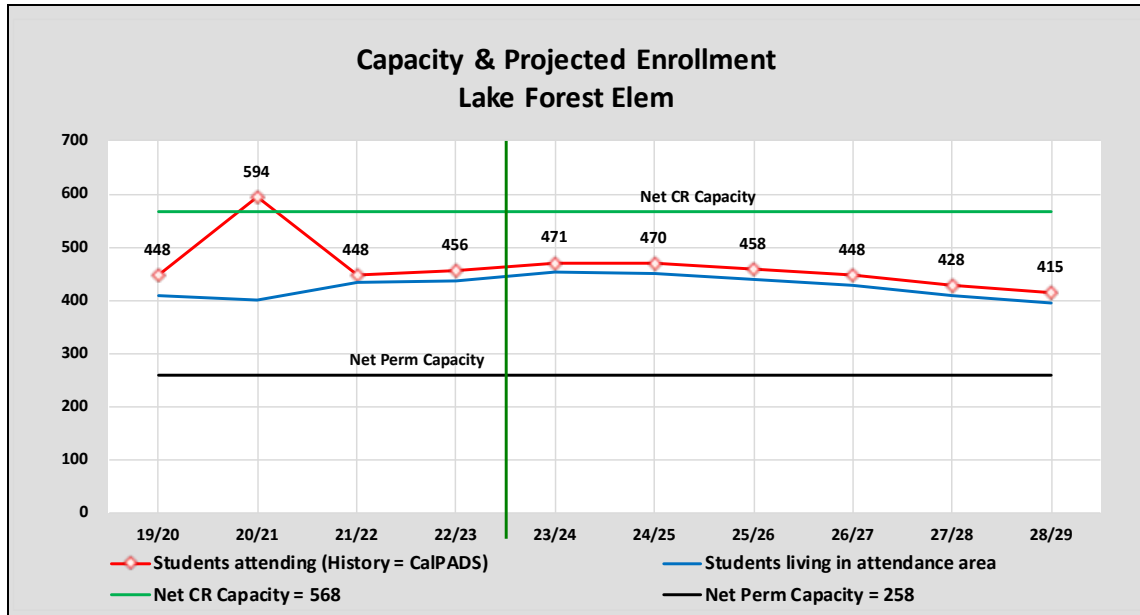
Parking & Traffic Flow

Replace Portables





# Lake Forest Elementary



- Permanent Classrooms
- Portable Classrooms



Permanent/Modular      Portable





# Lake Forest Elementary



Portables



Portables



ADA Path of Travel



Paint Exterior

## Future Modernization Projects

Roofing

Utilities

Safety & Security

Flatwork (paving)

Upgrade Technology

Remodel Restrooms

Upgrade Classroom Interior Spaces

Exterior Paint & Repairs

## Future New Construction Projects

Shade Structure

Replace Portables with Permanent  
Modular/Permanent New Construction

Master Plan	Cost Estimate
Modernization	\$1,789,606
New Construction	\$14,664,000
Total Cost	\$16,453,606





# Lakeview Elementary







# Stakeholder Engagement



## Lakeview Elementary

Overall rating 4.0 ★

Staff and Administrative Spaces

average rating 4.8 ★

Kitchen/Food Services

average rating 4.8 ★

Library

average rating 4.8 ★

Special Education Classrooms

average rating 4.5 ★

General Education Classroom Spaces

average rating 4.3 ★

Student Counseling Spaces

average rating 4.0 ★

Restrooms

average rating 4.0 ★

Multipurpose/Cafeteria

average rating 3.8 ★

Specialized Classrooms (Science, Music, Labs, Etc.)

average rating 3.5 ★

Physical Education/Indoor Athletic Spaces

average rating 3.0 ★

Outdoor Play Equipment, Hardcourts, Playfields

average rating 2.5 ★

HVAC



Repair Leaking Roofs



Safety & Security



Modernize Classrooms



Curb Appeal & Landscaping



Student & Staff Restrooms



Parking & Traffic Flow

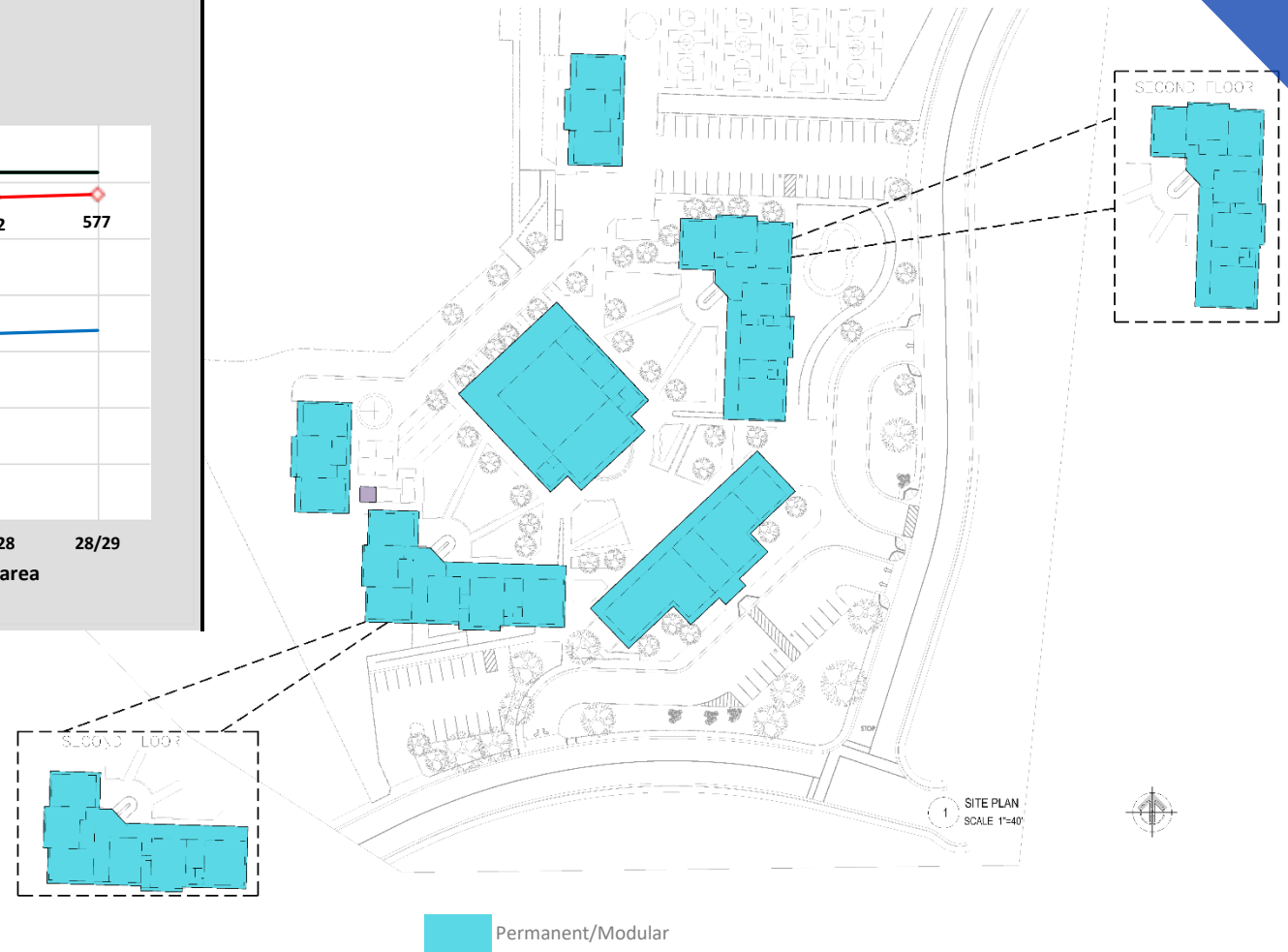
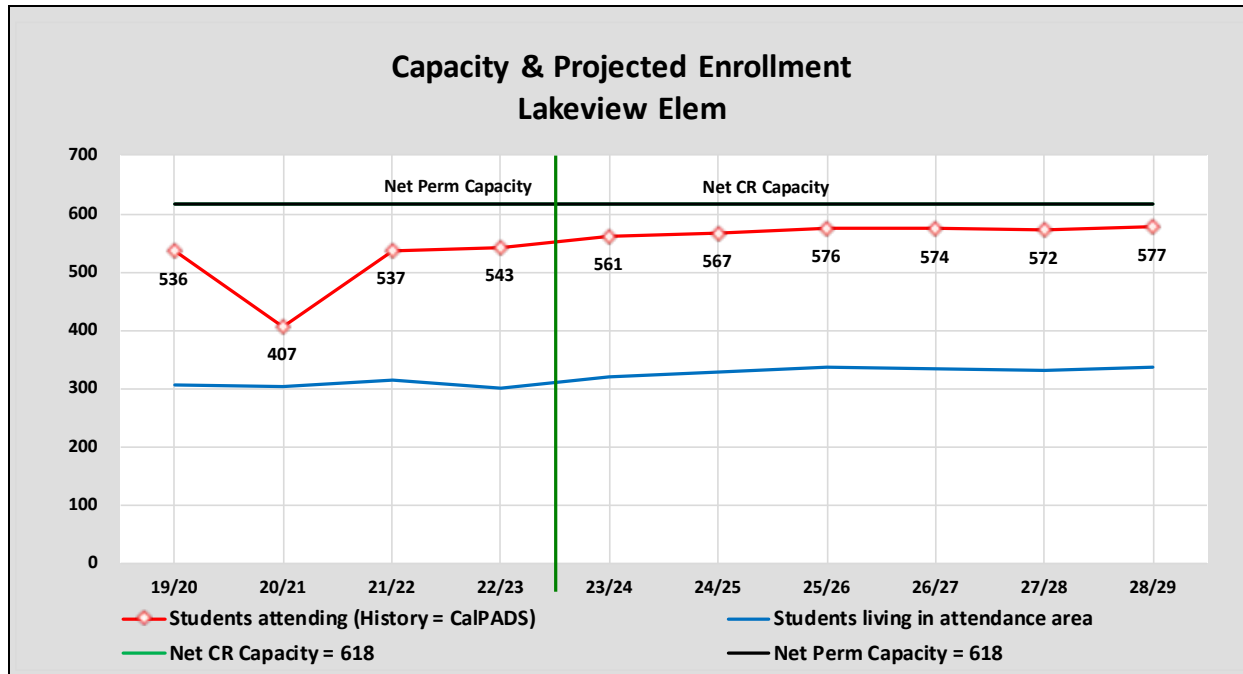


Replace Portables





# Lakeview Elementary





# Lakeview Elementary



Playground



Multipurpose/Cafeteria



## Future Modernization Projects

Utilities

Safety & Security

Upgrade Technology

General Deferred Maintenance Projects

## Future New Construction Projects

Shade Structure

DG (decomposed granite) track around field

## Master Plan

## Cost Estimate

Modernization

\$383,500

New Construction

\$1,495,000

Total Cost

\$1,878,500





# Rescue Elementary





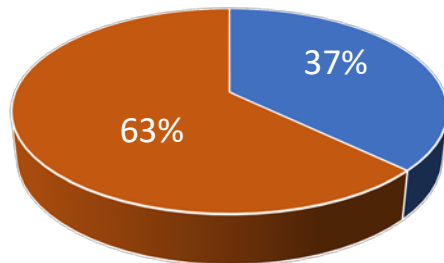
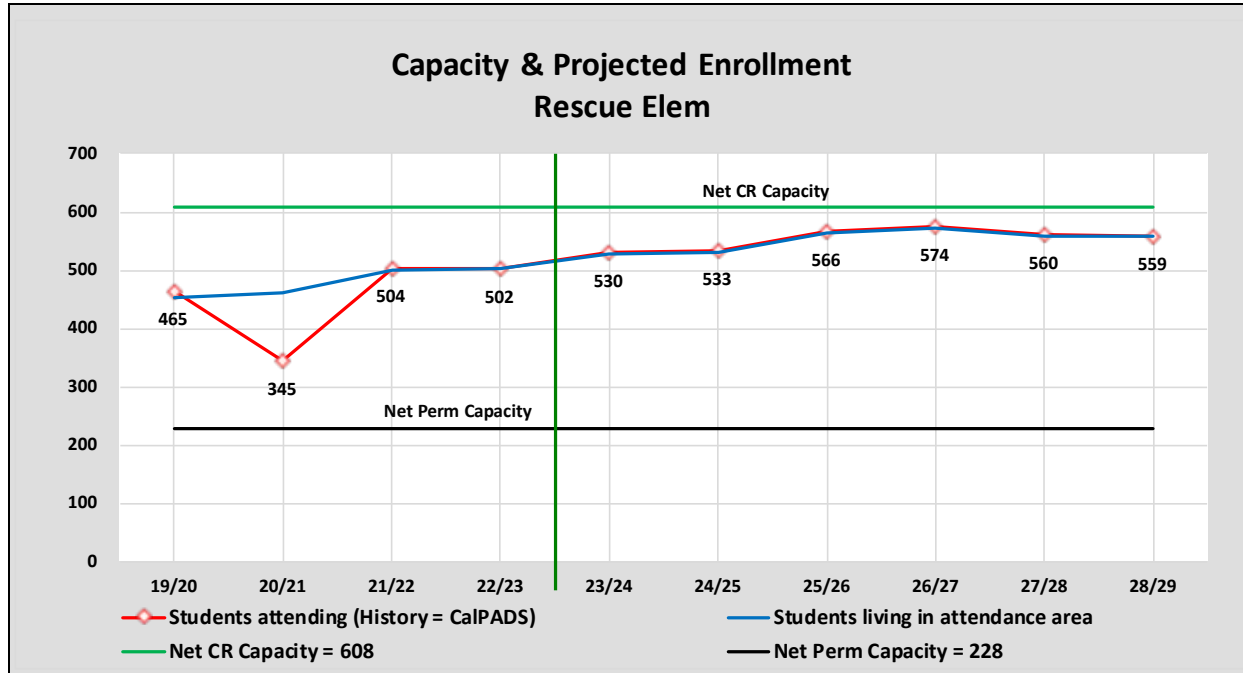


# Stakeholder Engagement





# Rescue Elementary



- Permanent Classrooms
- Portable Classrooms





# Rescue Elementary



Portables



Portables

## Future Modernization Projects

Roofing

Rehabilitate Playfields

Utilities

Safety & Security

Upgrade Technology

Remodel Restrooms

Upgrade Classroom Interior Spaces

Exterior Paint & Repairs

Replace Original Windows

## Future New Construction Projects

Replace Portables with Permanent  
Modular/Permanent New Construction



Restrooms



Original Windows

Master Plan	Cost Estimate
Modernization	\$3,486,956
New Construction	\$18,018,000
Total Cost	\$21,504,956





# Marina Village Middle







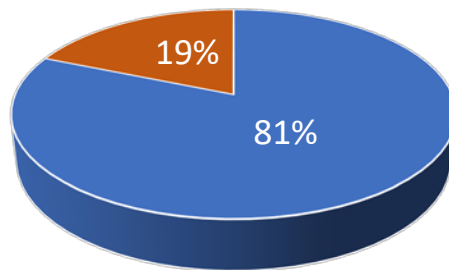
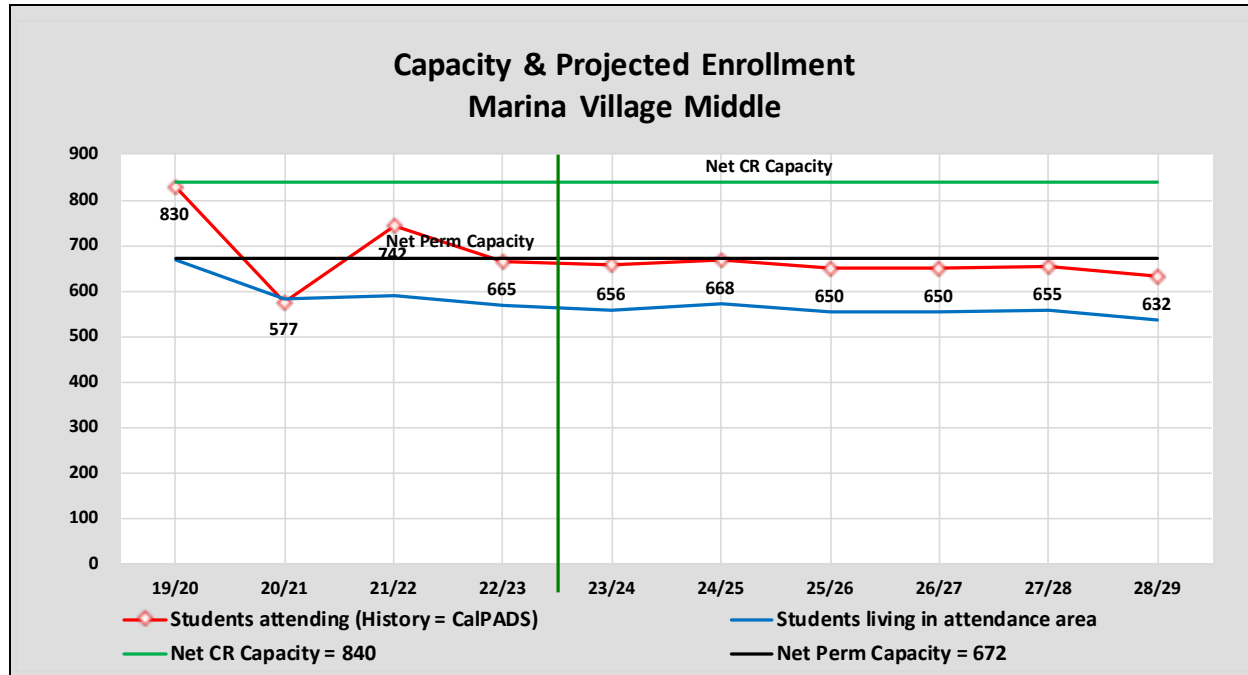
# Stakeholder Engagement



Marina Village Middle	★★★★☆	Overall rating 3.9 ★
Library	★★★★★	average rating 4.7 ★
Staff and Administrative Spaces	★★★★★	average rating 4.2 ★
Special Education Classrooms	★★★★★	average rating 4.0 ★
Physical Education/Indoor Athletic Spaces	★★★★★	average rating 3.9 ★
Specialized Classrooms (Science, Music, Labs, Etc.)	★★★★★	average rating 3.8 ★
Student Counseling Spaces	★★★★★	average rating 3.8 ★
Kitchen/Food Services	★★★★★	average rating 3.8 ★
Multipurpose/Cafeteria	★★★★★	average rating 3.7 ★
Outdoor Play Equipment, Hardcourts, Playfields	★★★★★	average rating 3.7 ★
General Education Classroom Spaces	★★★★★	average rating 3.6 ★
Restrooms	★★★★★	average rating 3.5 ★



# Marina Village Middle



- Permanent Classrooms
- Portable Classrooms



# Marina Village Middle



Portables



Classroom



Path of Travel



Multipurpose

## Future Modernization Projects

- Roofing
- Utilities
- Safety & Security
- Flatwork (paving)
- Upgrade Technology
- HVAC
- Upgrade Classroom Interior Spaces
- Exterior Paint & Repairs

## Future New Construction Projects

- Shade Structure
- Replace Portables with Permanent Modular/Permanent New Construction

Master Plan	Cost Estimate
Modernization	\$2,609,521
New Construction	\$5,648,500
Total Cost	\$8,258,021



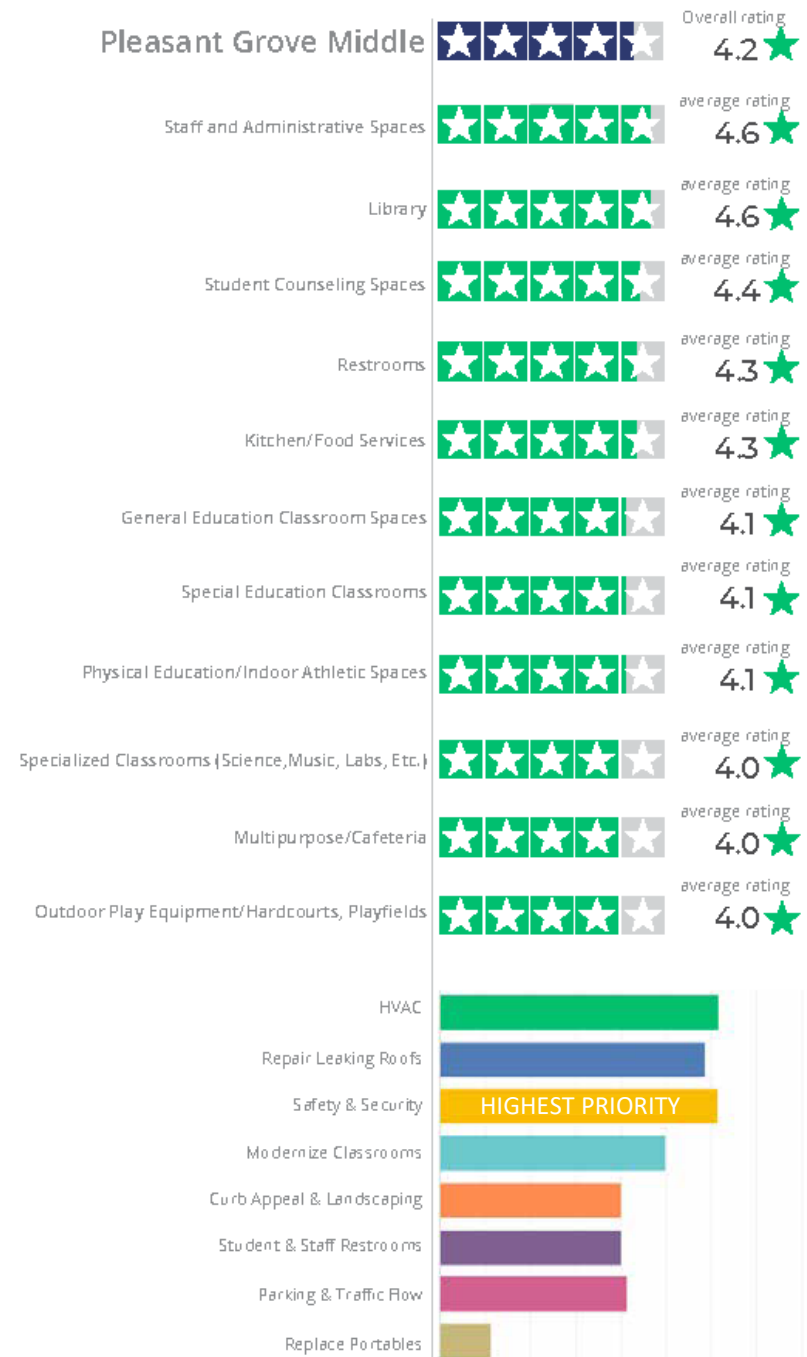


# Pleasant Grove Middle



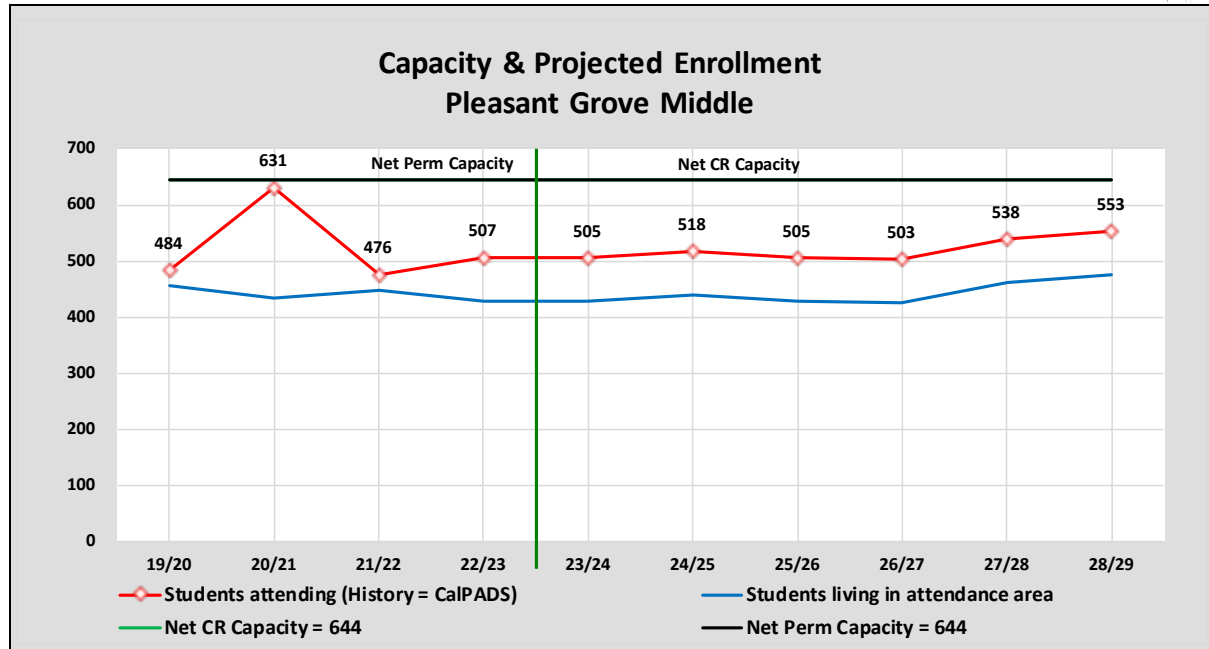


# Stakeholder Engagement





# Pleasant Grove Middle



Permanent/Modular





# Pleasant Grove Middle

## Future Modernization Projects

Roofing

Utilities

Safety & Security

Flatwork (paving)

Upgrade Technology

Landscaping

Upgrade Classroom Interior Spaces

Exterior Paint & Repairs

## Master Plan

## Cost Estimate

Modernization

\$2,750,670

New Construction

\$0

Total Cost

\$2,750,670



Correct Driveway Grade



Repurpose Planters



Exterior Sports Courts



Paint Exterior





# District Facilities







# District Facilities



Facilities, Maintenance & Operations/Transportation



District Office & Technology

The Facilities, Maintenance, Operations and Transportation departments are housed on the southern end of Rescue Elementary School. During the assessment it was noted that the District needs a new bay shop with interior offices and storage. Transportation would also like to remodel the existing shop interior and add a new in-ground hydraulic lift.

The District Office and Technology offices are currently housed in portable buildings on the Green Valley Elementary campus. While not a focal point of the Master Plan scope of work, the District may need to eventually address these aging facilities and infrastructure.

## Future New Projects

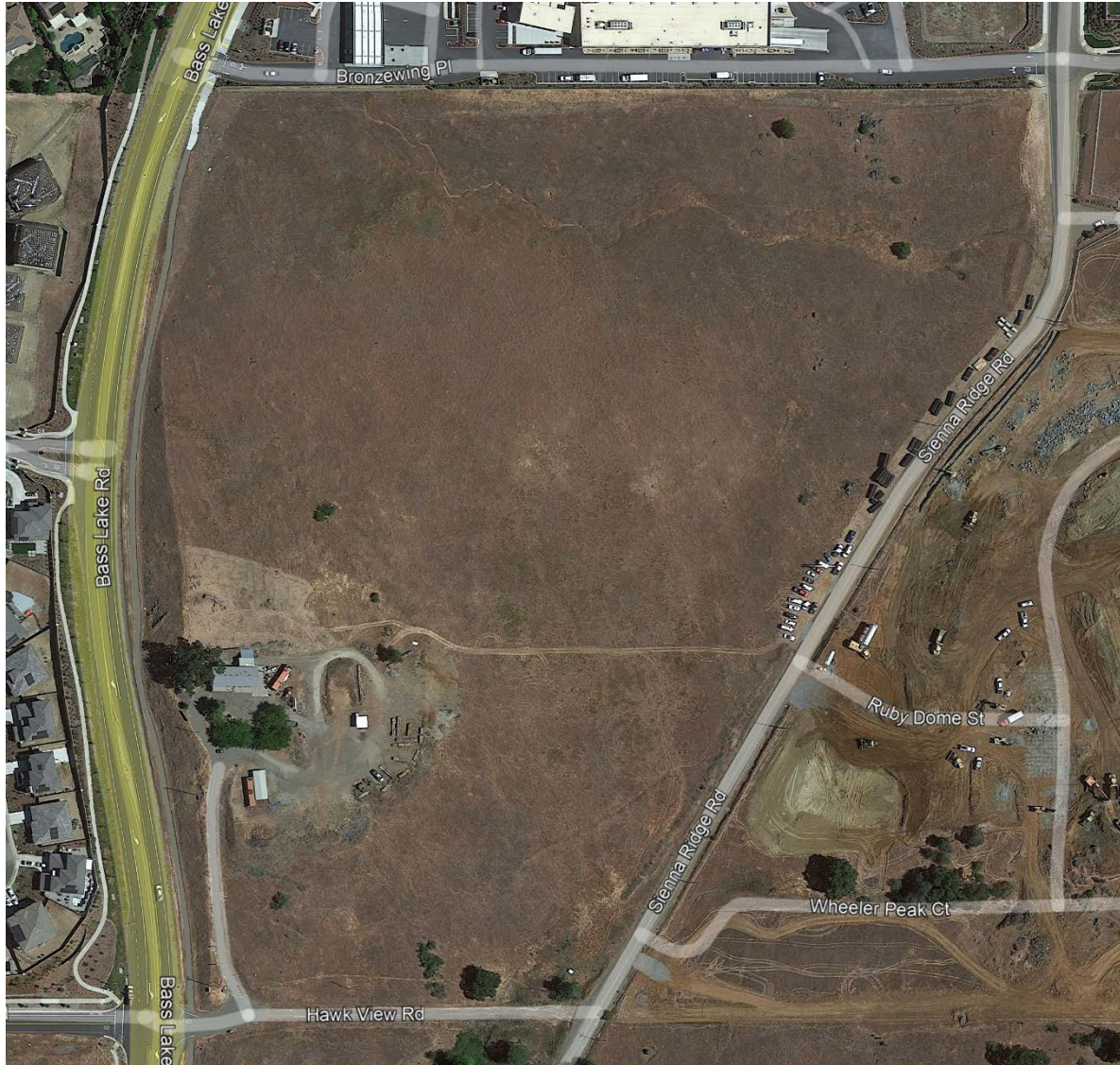
MOT Upgrades

Future District Office & Technology

Master Plan	Cost Estimate
MOT Upgrades	\$3,393,000
Future District Office	\$2,496,000
Total Cost	\$5,889,000



# District Facilities



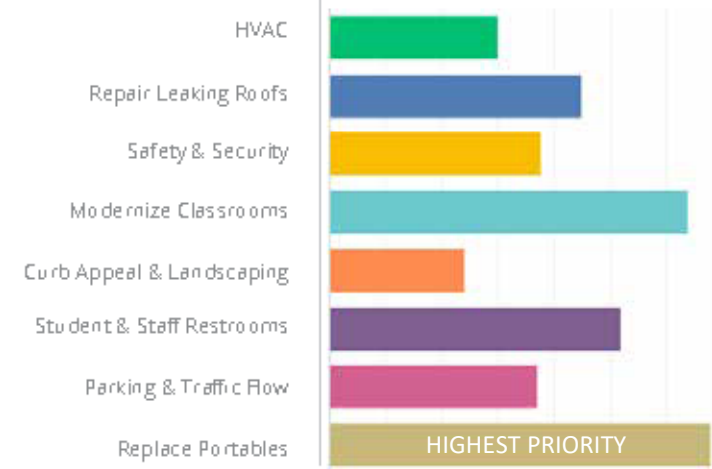
The District owns 21 acres of property of future expansion near the corner of Bass Lake Road and Serrano Parkway.

Sienna Ridge Property

# MASTER PLAN SUMMARY



# Stakeholder Engagement

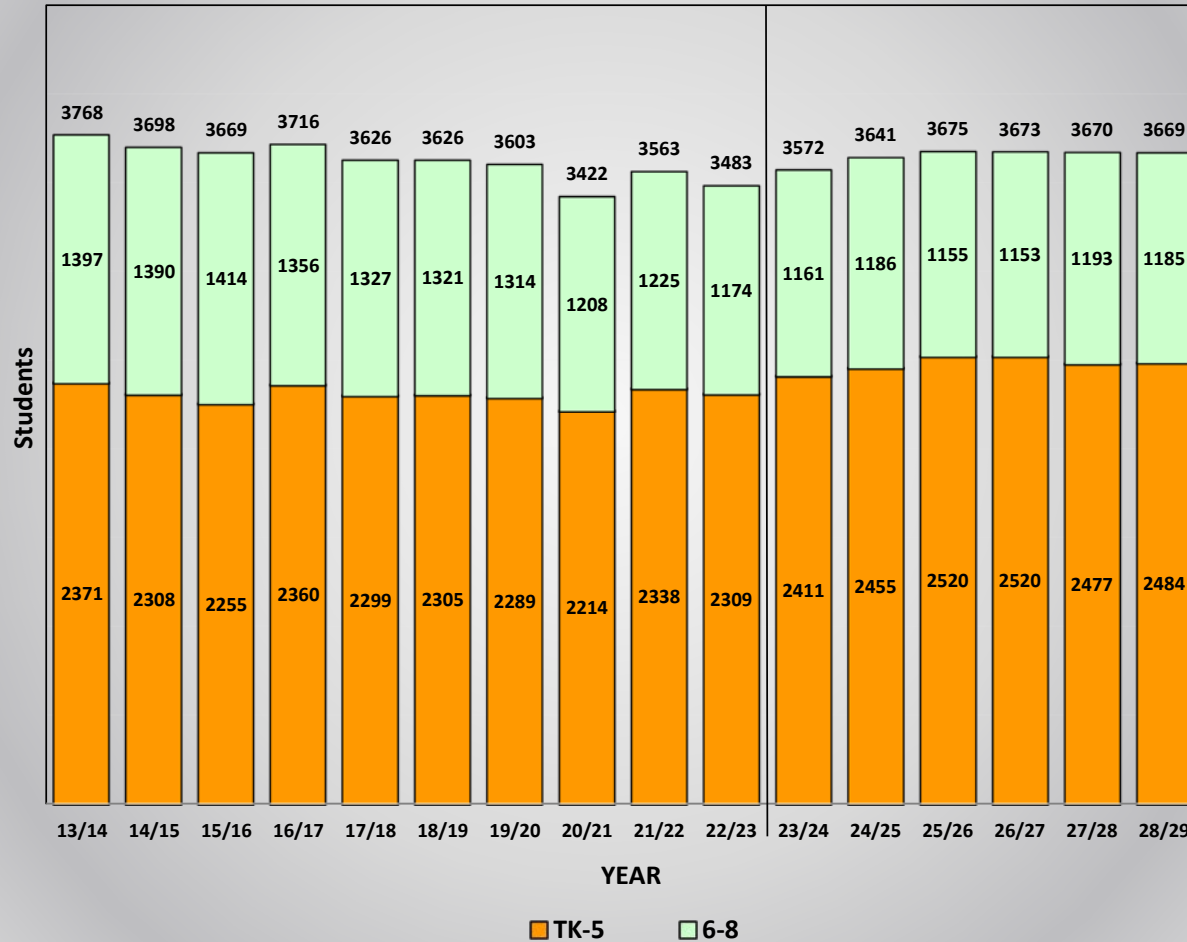






# Enrollment Projection

10 Year Enrollment History &  
6 Year Enrollment Projection





# School Site Assessments

- Cost Estimates
- Total Master Plan Projects: **\$73,606,959\***
- Modernization Projects: **\$14,306,939**
- New Construction Projects: **\$59,300,020**

\*Cost Estimates are based on 2023 rates and do not take into account future inflation adjustments.

## Classroom Statistics

- Gross Classroom Count: 211
- 34% of classrooms are portables
  - Lake Forest 64% portable classrooms
  - Rescue 64% portable classrooms
  - Green Valley 52% portable classrooms
  - Jackson 43% portable classrooms
- Average age of Portables is 30 years old





# Historic Funding

HISTORIC FUNDING 2000-2022 (STATE AND GENERAL OBLIGATION BONDS)							
Date	Site	Project Number	Description	State Modernization	State New Construction	Local General Obligation Bond	Total Funds
4/1/1998	GO Bond		Facilities; Technology, repairs, new classrooms	\$0	\$0	\$27,000,000	\$27,000,000
7/25/2000	Rescue Elementary	57/61978-00-001		\$352,502	\$0	\$0	\$352,502
9/15/2000	Green Valley Elementary	50/61978-00-001	Office/Library, Gym & 6 classrooms	\$0	\$3,103,876	\$0	\$3,103,876
2/19/2003	New Middle School	50/61978-00-002	Pleasant Grove Middle Construction	\$0	\$8,289,072	\$0	\$8,289,072
4/28/2003	New Elementary School	50/61978-00-003	Lakeview Elemenary Construction	\$0	\$7,285,882	\$0	\$7,285,882
9/20/2005	Jackson Elementary	57/61978-00-002		\$1,339,431	\$0	\$0	\$1,339,431
2/6/2008	Rescue Elementary	57/61978-00-003		\$622,052	\$0	\$0	\$622,052
4/1/2008	Rescue Elementary	50/61978-00-004	Kindergarten Building	\$0	\$974,659	\$0	\$974,659
7/29/2002	Marina Village	57/61978-00-005		\$4,446,896	\$0	\$0	\$4,446,896
Totals				\$6,760,881	\$19,653,489	\$27,000,000	\$53,414,370

PENDING SUBMITTED STATE PROJECTS							
Date	Site	Project Number	Description	State Modernization	State New Construction	Local General Obligation Bond	Total Funds
SAB APPROVED	Green Valley Elementary	57/61978-00-006	Administration/Kindergarten Modernization	\$3,401,723	\$0	\$0	\$3,401,723
SAB APPROVED	Rescue Elementary	57/61978-00-007	Multipurpose Modernization	\$1,522,341	\$0	\$0	\$1,522,341
Totals				\$4,924,064	\$0	\$0	\$4,924,064





Rescue Union School District  
Modernization Eligibility Analysis

# Future State Funding

State Match (60%)	2022	2023	2024	2025	2026	2027	2028	2029
Green Valley Elem	\$59,257	\$59,257	\$59,257	\$59,257	\$59,257	\$59,257	\$59,257	\$59,257
Jackson Elem	\$920,814	\$920,814	\$920,814	\$920,814	\$920,814	\$920,814	\$920,814	\$920,814
Lake Forest Elem	\$2,674,050	\$2,674,050	\$2,674,050	\$2,674,050	\$2,674,050	\$2,674,050	\$2,674,050	\$2,674,050
Lakeview Elem	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3,230,158
Rescue Elem	\$190,942	\$190,942	\$190,942	\$1,098,838	\$1,098,838	\$1,098,838	\$1,098,838	\$1,098,838
Marina Village Middle	\$215,518	\$215,518	\$215,518	\$215,518	\$215,518	\$215,518	\$215,518	\$215,518
Pleasant Grove Middle	\$0	\$0	\$0	\$0	\$0	\$2,997,907	\$2,997,907	\$2,997,907
<b>Totals</b>	<b>\$4,060,581</b>	<b>\$4,060,581</b>	<b>\$4,060,581</b>	<b>\$4,968,478</b>	<b>\$4,968,478</b>	<b>\$7,966,385</b>	<b>\$7,966,385</b>	<b>\$11,196,543</b>

Local Match (40%)	2022	2023	2024	2025	2026	2027	2028	2029
Green Valley Elem	\$39,505	\$39,505	\$39,505	\$39,505	\$39,505	\$39,505	\$39,505	\$39,505
Jackson Elem	\$613,876	\$613,876	\$613,876	\$613,876	\$613,876	\$613,876	\$613,876	\$613,876
Lake Forest Elem	\$1,782,700	\$1,782,700	\$1,782,700	\$1,782,700	\$1,782,700	\$1,782,700	\$1,782,700	\$1,782,700
Lakeview Elem	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$2,153,439
Rescue Elem	\$127,294	\$127,294	\$127,294	\$732,559	\$732,559	\$732,559	\$732,559	\$732,559
Marina Village Middle	\$143,679	\$143,679	\$143,679	\$143,679	\$143,679	\$143,679	\$143,679	\$143,679
Pleasant Grove Middle	\$0	\$0	\$0	\$0	\$0	\$1,998,605	\$1,998,605	\$1,998,605
<b>Totals</b>	<b>\$2,707,054</b>	<b>\$2,707,054</b>	<b>\$2,707,054</b>	<b>\$3,312,318</b>	<b>\$3,312,318</b>	<b>\$5,310,923</b>	<b>\$5,310,923</b>	<b>\$7,464,362</b>

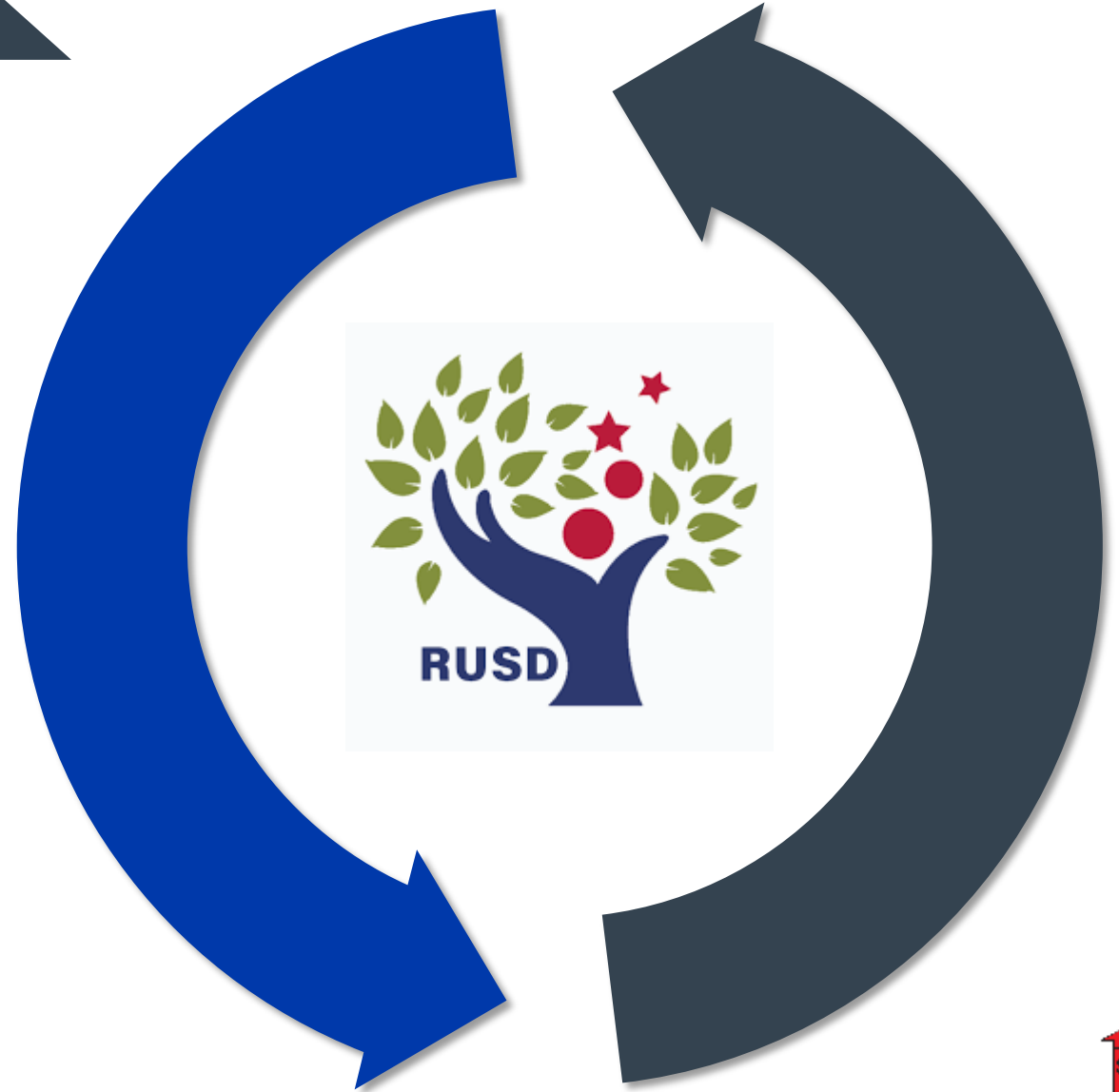
Project Totals	2022	2023	2024	2025	2026	2027	2028	2029
Green Valley Elem	\$98,762	\$98,762	\$98,762	\$98,762	\$98,762	\$98,762	\$98,762	\$98,762
Jackson Elem	\$1,534,690	\$1,534,690	\$1,534,690	\$1,534,690	\$1,534,690	\$1,534,690	\$1,534,690	\$1,534,690
Lake Forest Elem	\$4,456,750	\$4,456,750	\$4,456,750	\$4,456,750	\$4,456,750	\$4,456,750	\$4,456,750	\$4,456,750
Lakeview Elem	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$5,383,597
Rescue Elem	\$318,236	\$318,236	\$318,236	\$1,831,396	\$1,831,396	\$1,831,396	\$1,831,396	\$1,831,396
Marina Village Middle	\$359,197	\$359,197	\$359,197	\$359,197	\$359,197	\$359,197	\$359,197	\$359,197
Pleasant Grove Middle	\$0	\$0	\$0	\$0	\$0	\$4,996,512	\$4,996,512	\$4,996,512
<b>Totals</b>	<b>\$6,767,636</b>	<b>\$6,767,636</b>	<b>\$6,767,636</b>	<b>\$8,280,796</b>	<b>\$8,280,796</b>	<b>\$13,277,308</b>	<b>\$13,277,308</b>	<b>\$18,660,904</b>



## Next Step: Implementation Plan

- 1 Adhere to the 4 Facilities Master Plan questions
- 2 Analyze each foundational cornerstone results
- 3 Review District goals & objectives
- 4 Rank projects based on priority & future available funding

The Facilities Master Plan is a living document that will require periodic updates. The Foundational Cornerstones should be review and re-evaluated on an annual basis by District's guidance council.



Contact Us

## Contact us for further information



Ken Reynolds: 916.733.0402  
[ken@schoolworksgis.com](mailto:ken@schoolworksgis.com)

Brett Merrick: 916.300.0590  
[brett@schoolworksgis.com](mailto:brett@schoolworksgis.com)



8700 Auburn Folsom Rd. Suite 200  
Granite Bay, CA 95746





The background is a detailed architectural floor plan of a school building, rendered in a light blue, semi-transparent style. The plan includes various rooms such as a Gymnasium, Music Room, Multi Purpose room, and several classrooms. A large, bold, white 'THANK YOU' text is centered over the plan. A blue diagonal band runs from the bottom left towards the middle right of the image. On the right side, there is a vertical scale or index with numbers 10 through 19. 

# THANK YOU

# Mountain Democrat

PROOF OF PUBLICATION  
(2015.5. C.C.P.)

## Proof of Publication NOTICE OF PUBLIC HEARING

STATE OF CALIFORNIA  
County of El Dorado

I am a citizen of the United States and a resident of the County aforesaid; I'm over the age of eighteen years, and not a party to or interested in the above-entitled matter. I am principal clerk of the printer at the Mountain Democrat, 2889 Ray Lawyer Drive, a newspaper of general circulation, printed and published Monday, Wednesday, and Friday, in the City of Placerville, County of El Dorado, and which newspaper has been adjudged a newspaper of general circulation by the Superior Court to the County of El Dorado, State of California, under the date of March 7, 1952, Case Number 7258; that the notice, of which the annexed is a printed copy (set in type no smaller than non-pareil), has been published in each regular and entire issue of said newspaper and not in any supplement thereof on the following dates, to-wit:

10/11

ALL IN THE YEAR 2023

I certify (or declare) under penalty of perjury that the foregoing is true and correct.

Dated at Placerville, California, this 11th day  
of OCTOBER, 2023

Allison Rains

Signature

Allison Rains  
Legals Clerk

### NOTICE OF PUBLIC HEARING

Please take notice that on December 12, 2023 the Rescue Union School District Board of Trustees will declare specified instructional materials textbooks and library titles as surplus. The Board meeting will be held at 6:30 p.m. at the Rescue Union School District Board Room, 2390 Bass Lake Road, Rescue, Ca. 95672. Individuals or organizations may view a copy of the instructional materials to be declared as surplus at the Rescue Union School District Office, 2390 Bass Lake Road, Rescue, Ca. 95672, during the hours of 8:00 a.m. and 4:30 p.m. Monday through Friday.  
10/11 12368





Date: 10/5/2023

District Use Only

[illegible]

  
Principal / Supervisor Signature

\* If there is no inventory number on the equipment, please record the serial number or model number in its place.

Date: 10/4/23

District Use Only

Lake Forest

Type of Disposition:

Debbie Shedd

Board Approval Date:

Library

Disposition Contact:

[illegible]

Code	Description
A	Fair Equipment that is usable without repairs, but is somewhat worn or deteriorated and soon may require repair.
B	Poor Equipment that is usable but is considerably worn or deteriorated. The remaining utility is limited or major repairs will be required.
C	Unusable, cannot be repaired.

Principal / Supervisor Signature Kenneth M. Hall

Date: 9-28-23

District Use Only

Type of Disposition:

Board Approval Date:

Disposition Contact:

Disposition Contact:

[illegible]

James J.

Code	Description
A	Fair Equipment that is usable without repairs, but is somewhat worn or deteriorated and soon may require repair.
B	Poor Equipment that is usable but is considerably worn or deteriorated. The remaining utility is limited or major repairs will be required.
C	Unusable, cannot be repaired.

\* If there is no inventory number on the equipment, please record the serial number or model number in its place.



## Report of Surplus Equipment

Date: 8.8.23

District Use Only

Name of School / Department:	Rescue Elementary	Type of Disposition:
Name / Title of Person to Contact for Further Information:	Victoria Kimes	Date of Board Approval:
Building / Room Number Which Equipment Was Assigned:	LibRARY	Disposition Contact:

[illegible]

Code	Description
A	Fair Equipment that is usable without repairs but is somewhat worn or deteriorated and soon may require repair.
B	Poor Equipment that is usable but is considerably worn or deteriorated. The remaining utility is limited or major repairs will be required.
C	Unusable, cannot be repaired.

\* If there is no inventory number on the equipment, please record the serial number or model number in its place.





OPINION  
RESEARCH  
& STRATEGY

**TO** Jim Shoemake  
Rescue Union School District

**FROM** Dave Metz and Miranda Everitt  
FM3 Research

**RE:** Proposal to Conduct Opinion Research for Rescue USD

**DATE** November 8, 2023

---

Fairbank, Maslin, Maullin, Metz & Associates (FM3) is pleased to submit this brief proposal to conduct opinion research assessing voter views of a potential measure to fund Rescue Union School District priorities.

FM3 is a leading provider of accurate public opinion research for local California K-12 school districts considering revenue-enhancing ballot measures—the firm’s research has helped secure voter approval for more than \$59 billion in general obligation bond funding for California’s K-12 school districts. More than 95% of the local school finance measures worked on by FM3 have gone on to win in the election.

The balance of this proposal includes details on our relevant experience as well as our proposed research approach and associated costs.

#### **Firm Background**

Fairbank, Maslin, Maullin, Metz & Associates (FM3) has been conducting public policy-oriented opinion research since 1981. As a medium-sized research firm with offices in Oakland and Los Angeles, California, FM3 provides its clients with a level of personal attention and service from firm partners that is more often associated with much smaller organizations, while concurrently offering the wide range of services, adherence to expedited timelines, and absolute quality control that is to be expected from much larger research firms. FM3’s in-house Data Processing and Graphics departments allow us to meet the inherent demands of even the most aggressive deadlines, and further, to provide a wider variety of services than would otherwise be possible—such as performing advanced statistical analysis to reap the greatest possible insight from your data.

#### **Experience Conducting Research on School Bond Measures**

Our research has helped secure voter approval for more than 200 bonds totaling \$59 billion in general obligation bond funding for K-12 school districts. The depth and diversity of FM3’s experience with California’s local school districts represents an added value for Rescue USD. One such benefit is our firm’s ability to provide, throughout the election cycle, an awareness of which educational messages and communications strategies prove to be effective in other California school districts.



In 2022 alone, FM3 helped raise \$11.8 billion in capital funding for 13 school and community college districts across the state. This includes work we did to help the **Los Angeles Community College District** pass a \$5.3 billion bond, the largest ever passed by any community college district in the country. Additionally, we are proud to have worked on successful bond measure campaigns in the following districts in 2022: **Cerritos CCD, College of the Sequoias CCD, Forestville USD, Little Lake City SD, Long Beach USD, Oakland USD, Pleasanton USD, Ravenswood CSD, Rialto USD, San Diego USD, Santa Rita USD, Selma USD, Twin Rivers USD, and Wiseburn USD.**

In addition to testing core concepts such as bond measure viability, voters' tax tolerance, optimal election timing, and voters' sense of a District's financial needs, our bond measure research works to achieve four key objectives:

- Quantitatively test voters' sense of urgency and priority for dozens of potential projects and expenditures, and then works collaboratively with District legal counsel to draft a 75-word ballot label that meets legal requirements while emphasizing as many of your voters' top priorities as possible.
- Assess the relative efficacy of a range of non-advocacy, public education statements to identify which themes and information will resonate most with voters in the context of public outreach efforts.
- Test the impact of finance measure opponents' potential criticisms to provide the District a quantitative assessment of which opposition arguments may be most damaging to a bond measure's standing among the electorate.
- Learn which sources voters use to get information about the District, and which public figures and organizations would prove the most credible as messengers about the District's bond measure.

### **Research Approach and Associated Costs**

The research process will begin with an initial kickoff meeting between FM3 and your project team. This meeting will provide an opportunity for an extensive review of relevant background information and context, as well as a detailed discussion of your objectives for the project.

In designing a survey questionnaire for the District, FM3 will draw from its knowledge of public opinion survey methodology; our comprehensive review of the District's past survey research (including tracking past questions when appropriate); your current and future objectives and needs; and our own vast library of research on education funding measures. We will proceed through several drafts, incorporating feedback from your team before each revision, to develop a research instrument that will successfully obtain all the desired information.

FM3 will then construct a sample by pulling a random list of voters from the voter file. Based upon the final sample specifications, FM3 will set a target number of interviews to be completed online. We will then send out email invitations to everyone with a valid email address. Within several days of the initial invitation distribution, we will examine the demographic and geographic characteristics of the online completes and then begin conducting telephone interviews to balance out the sample and target underrepresented subgroups. Additionally, we will send out a number of text invitations to help reach the overall target number of online completes and complement the other contact methods.

Once the survey is complete, FM3 will generate a detailed report of the survey results in a PowerPoint presentation, including demographic breakouts and summaries of key findings. These results are typically

presented in draft format to the client team and then further refined based upon feedback from that group. A version of this presentation will also be developed in a format suitable for FM3 to present in a public forum.

Our proposed research approach is as follows:

**Methodology** Dual-mode survey obtaining interviews via cell phone, landline, text message, and email invitations

**Sample** 300 to 400 voters likely to participate in the November 2024 election

**Margin of**  $\pm 5.8\%$  for a sample of 300 interviews

**Sampling Error**  $\pm 4.9\%$  for a sample of 400 interviews

at the 95% confidence level (i.e., in 95 out of 100 cases)

**Questionnaire** 15 to 20 minutes

**Deliverables** Following the completion of the survey, we will provide:

- A questionnaire with the topline results of the survey for easy reference
- A complete set of crosstabs in an easy-to-read, comprehensive format
- Verbatim responses to any open-ended questions
- A complete analysis of survey results in PowerPoint
- A presentation of the survey results

FM3 will also be available for ongoing consultation and any further analysis of the research.

**Cost** The prices below are comprehensive and include all costs for questionnaire design; sample acquisition and preparation; programming; email and text invitations; survey hosting; telephone interviewing; data entry and analysis; and reporting.

Survey Length	300 Interviews	400 Interviews
15 minutes	\$25,250	\$28,750
20 minutes	\$28,000	\$31,750

We would welcome the opportunity to work with you on this research, and if you have any questions or if there is any further information we can provide, please do not hesitate to contact us.

Thank you for your consideration and you may reach us as follows:



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