

Proposal for
**Survey Feasibility
And Related Services**

Prepared For
The City of Albany, California
December 9, 2011



TRAMUTOLA

THE DISCIPLINE OF WINNING

TRAMUTOLA LLC
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December 9, 2011

Ms. Nicole Almaguer
Environmental Specialist
City of Albany
1000 San Pablo Avenue
Albany, CA 94706

Via Email: nalmaguer@albanyca.org

**RE: Proposal to Provide Survey Feasibility & Related Services To
The City of Albany for a Possible 2012 Revenue Measure**

Dear Ms. Almaguer:

The team of TRAMUTOLA LLC (TRAMUTOLA), and True North Research, Inc. (True North), is pleased to present this Proposal for Survey Feasibility and Related Services to the City of Albany for a possible 2012 revenue measure. We are well qualified in the complex tax election consulting disciplines of public opinion research, stakeholder analysis, election selection, ballot measure preparation, and related services. We have a proven track record working in local California communities, including Alameda County, and our experience leads the industry. We appreciate this opportunity to respond to your RFP.

Our team is a good fit for your project. **TRAMUTOLA and True North specialize in helping communities prepare for and pass difficult tax measures.** For 25 years we have collectively served hundreds of public agencies—cities, counties, parks and recreation districts, public school and community college districts, healthcare and hospital districts and others—seeking specialized advice on public opinion polling, tax election feasibility, planning, public information, ballot measure preparation, and related services. Our experience leads the industry - *even in today's ongoing turbulent economy.*

OUR PROMISE TO YOU:

We understand that Albany is *unique* and that you have important opinions about what is needed to achieve your financial and strategic goals through this project. True North will lead the Feasibility Research work needed for electoral success while TRAMUTOLA will provide essential political and communications strategy support. We promise to put our time-tested expertise, proven experience, and industry-leading creative strategies to work for you to identify the successful revenue measure that earns and keeps your public's trust.

CHALLENGES. To achieve the impact you desire, the City needs a consulting team that has a diverse set of skills, experience, and capabilities. You must be able to count on your consulting team for the inherent wisdom and guidance that comes only with years of direct on-the-ground experience in the trenches. Your team should possess a sophisticated understanding of the methodologies that can translate effective research into successful communications results that resonate with Albany voters (especially in difficult economic and political times). And, your team must be able to effectively inform and educate your community about the issues at hand *without "crossing the line" politically or financially.* Of course, your consulting team must have the interest, commitment and availability to work closely with the City and in particular, those who will ultimately be working directly with key stakeholders and the public.

COMPETITIVE STRENGTHS OF OUR TEAM. We have the unique skill set and experience required to properly prepare and guide you to electoral success. Here are the key strengths of our team:

- **Leading Edge, Relevant, and Extensive City/Local Experience.** Our team is comprised of industry leaders. Our track records guiding public agencies in conducting reliable research and communicating with impact are recognized throughout California. Members of our team have direct and compelling experience working with local communities in your area.
- **We WIN.** Collectively, our team has guided over 600 local public survey projects in California – many have subsequently involved successful elections for local revenue (tax) measures facing super-majority (66.7%) thresholds. Over the years, our work has helped create community support for and generated over \$40 billion in community improvements. Our proven approach and methods will help you understand what your unique community of Albany voters is willing to support and create a compelling message that will help you position your measure for future electoral success.
- **We Understand that Your Community is Unique.** We don't take an off-the-shelf approach to client work with public agencies that, now more than ever, are being tested by dwindling budgets and a demanding public. Although there are some universal truths in the work we do, our experience suggests that successful local revenue measure projects, regardless of the program or cause, rely on identifying and embracing the unique characteristics of the host community.
- **Personal Attention.** We believe that the best way to conduct your project is to have the people on our team with the most expertise and experience roll up their sleeves and actually do the work. You get “top level staff” ALL the time.
- **Winning Without Crossing The Line.** Some firms encourage their clients to take unnecessary risks when using public funds to communicate with various segments of the public, which has prompted scrutiny and recent decisions from the California Supreme Court and the Fair Political Practices Commission (FPPC) that impact public information campaigns. Not only will the inappropriate use of public funds place the City in legal jeopardy, the mere suggestion that you may be crossing the line with your communications will be enough to turn public support and voter opinion solidly against the City regardless of whether either organization has actually crossed any legal line. TRAMUTOLA has been at the forefront in establishing clear standards and best practices to ensure our clients are compliant with the law and pass the “sniff” test with voters.

From all of us on the **TRAMUTOLA and True North Team**, thank you for your consideration. We look forward to the opportunity to put our experience, strategic capabilities and passion to work for YOU.

Sincerely,



Bonnie J. Moss

Executive Vice President, TRAMUTOLA LLC

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CITY OF ALBANY
FEASIBILITY SURVEY & RELATED SERVICES PROPOSAL
FOR A POTENTIAL 2012 LOCAL REVENUE MEASURE

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PROJECT OVERVIEW

Located in Alameda County, the City of Albany is home to approximately 18,539 residents. Of the 18,539 residents of Albany, there are 9,680 registered voters living in 5,574 households. The City is largely Democratic with 6,278 registered Democrats, compared to 708 registered Republicans, and 2,042 voters registered as declined to state. Based on voter demographics and voting history, The City has an extremely high voter-turnout rate with over 87% of registered voters likely to vote in the November 2012 Presidential election and 53% likely to vote in the June 2012 Presidential Primary election.

THE PURPOSE OF THIS STUDY

The purpose of this proposed survey is to produce an unbiased, statistically reliable evaluation of Albany voters' interest in supporting a local revenue measure, as well as identify how to structure a measure so that it is consistent with the electorate's priorities and sensitivities. In short, the goal is to assess the feasibility of placing a revenue measure on a 2012 ballot and—if feasible—determine how best to package a measure for success. **To that end, in the Feasibility Phase of this project, True North will lead the specific Research tasks, while TRAMUTOLA will provide essential political and communications strategy support.** (Note: assuming the survey results are promising and the City chooses to move forward with a measure, our consulting roles would then shift – and TRAMUTOLA would take the lead to assist the City in preparing for the ballot and implementing an effective public education program, *informed by* the early research work completed under the leadership of True North).

As detailed later in this proposal, we have proposed a sophisticated survey research methodology for assessing the feasibility of a number of possible revenue measures. Although our research design is based on methods that are proven industry standards, our attention to detail and both the extent and manner in which we analyze the data are anything but standard.

As the City is well aware, creating revenue measures that are ultimately approved by the necessary percentage of voters is difficult, especially in the State of California. Successful measures require careful packaging—and it is in this area that the research performed by True North will be quite valuable. Our team has developed a proven framework for the design of revenue measure studies that captures the pieces of information needed for estimating the feasibility of a measure and, if feasible, determining how best to package the measure for success. The survey will identify the issues that voters feel are most important, how protecting city programs and services ranks next to other important issues, baseline (uninformed) support for a measure, the tax rate that voters will support, the projects, programs and services that voters are most interested in funding, the information items that shape voter support for a measure, as well as how voter support for a measure may change once voters have basic information about the measure. Collectively, this information will allow the team to determine if the City should move forward with a local tax measure and, if so, the steps that should be taken to maximize the measure's chances of success including a voter public education plan.

A. TEAM QUALIFICATIONS & EXPERIENCE

OUR TEAM

Our Team is comprised of TRAMUTOLA LLC, specializing in tax election and communications strategy, and True North Research, specializing in all aspects of public opinion research. Together we have an unmatched track record passing local tax measures in California. Collectively, we have helped pass more than 300 tax measures at the local level, raising over \$40 billion for important community causes. The insights we have gained guiding local public agencies over the years have allowed us to maintain the highest tax election success rate in the industry (90+%) – even during the current tough economic and politically demanding electoral environment.

TRUE NORTH RESEARCH – Public Opinion Research Expert

741 Garden View Court, Suite 208, Encinitas, CA 92024 / 760-632-9900 / www.tn-research.com

Founded in 2002, True North is a full-service survey research firm that is dedicated to providing public agencies with a clear understanding of the opinions, perceptions, choices and behaviors of their residents and customers. 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, program development and evaluation, as well as developing and evaluating marketing campaigns.

In addition to being recognized experts in survey research methods *generally*, the members of our team are highly experienced in using survey methods to both develop and evaluate the effectiveness of advertising, outreach and marketing campaigns for a diverse set of clients, ranging from hundreds of public agencies to private sector clients including Amazon.com and Cox Communications. Moreover, we are among the nation’s leading experts in developing research methodologies for quantifying the impacts of marketing campaigns on awareness, attitudes, and behaviors related to environmental issues including air quality, water quality, energy use, driving, and climate change.

True North, has been at the forefront in developing innovative survey methodologies to overcome these new challenges and ensure statistically reliable results—including hybrid sampling techniques using land line, cell phone and email recruiting methods, as well as mixed-method data collection approaches that provide residents with the flexibility to participate by telephone or online at a secure, password protected web site. Collectively, our recommended approaches have increased participation rates, reduced response bias, and increased the overall accuracy and reliability of our clients’ survey results when compared to the methodologies typically used by other firms.

The technical expertise of the Principals at True North has been recognized in a number of ways. For example, Dr. McLarney has served as an independent expert witness in survey research methodology for California legal cases, has designed survey research and sampling methodologies that are being used by public agencies nationwide as the agreed-upon best-practices model, has delivered numerous lectures and research papers at conferences on survey research methodology, has published research in refereed academic journals, and on the basis of his research was honored as a Visiting Scholar at the Institute of Governmental Studies at UC Berkeley. Mr. Sarles’ research has also been published in refereed academic journals, and he was the principal author of a primer on survey methodology for the California Library Association that was distributed and presented to institutional members statewide.

TRAMUTOLA – Political/Communications Strategist

191 Ridgeway Avenue, Oakland, CA 94611 / 510-658-7003 / www.tramutola.com

TRAMUTOLA is one of the most successful and innovative **locally focused** public communications consulting firms in California. **TRAMUTOLA specializes in helping communities prepare for and pass difficult tax measures.** For over 25 years we have been perfecting public communications, political strategy and electoral success **at the local community level.** We are small by choice—with just 10 team members including lead consultants and support staff. TRAMUTOLA is known for our leading-edge communications strategy, candid political advice, and tireless work ethic. Our approach—a blend of sophisticated research, effective community organizing, compelling communications, and smart political strategy—has proven to be successful time and again.

You may have developed mixed opinions about consultants over time. We are different.

First, we view our work as more than a business – it’s a cause. Now more than ever, in today’s demanding economic and political environment, our most important work is **helping our clients earn and keep the public’s trust.** This is especially true when the goal is a local tax measure. We have created a system - it is proven. When our clients follow the system that we teach – they win.

Second, our track record. We are community STRATEGISTS first and foremost. We take great care to start each project by defining with our clients what winning looks like. Because of our leading-edge focus on STRATEGY, NO other firm in the State can match TRAMUTOLA’S verifiable track record at the local community level – including over 500 successful local public campaigns and communications initiatives; **268 were successful tax elections producing over \$30 billion in new revenue** for California communities – and one of the best parcel tax track records in the state. Regardless of how our public sector clients define “winning”, we help them achieve their goals at least 90+% of the time. Public finance communications work is a primary area of practice at the firm.

Third, no one in the industry will work harder or smarter for you. A skilled team of professionals is assigned to every TRAMUTOLA project. Having more than one member of our team service your needs ensures responsiveness, continuity and quality. We make **client satisfaction** a top priority, which helps us continuously improve and serve our TRAMUTOLA family of clients even better. The point is we strive to listen and constantly improve.

TRAMUTOLA – TRUE NORTH CITY CLIENT EXPERIENCE

California cities which are or have previously been served by TRAMUTOLA and True North include the cities of Agoura Hills, Alameda, Aliso Viejo, Anaheim, Apple Valley, Azusa, Banning, Benicia, Beverly Hills, Brea, Burbank, Campbell, Cerritos, Chino, Claremont, Clayton, Colton, Costa Mesa, Covina, Dana Point, Diamond Bar, El Cajon, Encinitas, Folsom, Fontana, Fremont, Gilroy, Glendale, Glendora, Half Moon Bay, Hayward, Hesperia, Huntington Beach, Indian Wells, Irvine, La Canada-Flintridge, Laguna Beach, Laguna Niguel, Lake Forest, La Mesa, Lathrop, La Verne, Lemon Grove, Lompoc, Long Beach, Los Altos, Los Angeles, Los Gatos, Malibu, Manhattan Beach, Mission Viejo, Moorpark, Mountain View, Murrieta, Norwalk, Oakland, Oxnard, Palmdale, Petaluma, Pico Rivera, Placentia, Port Hueneme, Rancho Cucamonga, Rancho Palos Verdes, Rancho Santa Margarita, Redlands, Redondo Beach, Richmond, Riverside, Rocklin, San Bernardino, San Carlos, San Clemente, San Diego, San Gabriel, San Jose, San Marcos, San Marino, San Rafael, Santa Clarita, Santa Monica, Sausalito, South El Monte, Temecula, Thousand Oaks, Truckee, Upland, Union City, San Buenaventura, Westlake Village, Watsonville, West Hollywood, Whittier and Yorba Linda.

REFERENCES

City of San Carlos. Contact: Jeff Maltbie, City Manager. 600 Elm Street, San Carlos CA 94070. Phone: 650.802.4228. **True North Experience:** Voter Surveys ('08, '09), Community Survey ('11).

City of San Jose. Contact: Page Benway, Senior Analyst, 200 East Santa Clara St., San Jose CA 95113. Phone: 408.535.7887. Email: Page.Benway@sanjoseca.gov. **True North Experience:** Customer Surveys ('06, '07, '08, '09, '10, '11).

City of Banning. Contact: Hon. Bob Botts, Mayor. 99 East Ramsey Street, Banning, CA 92220. Home Phone: 951-845-2228. Email: bbotts@dc.rr.com **TRUE NORTH & TRAMUTOLA Experience:** Research and public information services. Start/End: June – November 2009 (Measure L). WIN: 75.14%

City of Placentia. Contact: Troy Butzlaff, City Administrator. Ph: 714-993-8117. Email: tbutzlaff@placentia.org. **TRUE NORTH & TRAMUTOLA Experience:** Research and public information services. Start/End: June – November 2010 (Measure W). WIN: 61.4% YES.

City of San Gabriel. Michael Paules, City Manager. City of San Gabriel, 425 Mission Ave., San Gabriel, CA 91776. Phone: (626) 308-2800. Email: mpaules@sgch.org **TRUE NORTH & TRAMUTOLA Experience:** Research and public information. Start/End: June – Nov 2008 (Measure SG). WIN: 66.13%

City of El Cajon. Contact: Nancy Palm, Assistant City Manager/Finance. 200 East Main Street, El Cajon, CA 92020. Phone: 619-441-1780. Email: npalm@ci.el-cajon.ca.us **TRUE NORTH & TRAMUTOLA Experience:** Research and public information services for two sales tax measures – 2004 (68% YES) & 2008 (51.77% YES).

B. PROJECT TEAM

OUR TEAM employs a team approach to achieve superior results for our clients and ensure complete client satisfaction. Every project is supervised by experienced **Senior Consultants**. Our *team approach* ensures that clients feel heard and needs are addressed professionally. In particular, opinion research projects like yours, receive the full personal leadership and attention of True North President Dr. Timothy McLarney, Ph.D. We pay deliberate attention to *client-consultant communications*—whether in personal meetings, via email or phone. We provide all of our contact information—including personal phone numbers—to ensure our team members are 100% accessible.

Lead consultants for this project will be:

From TRUE NORTH: Timothy McLarney, Ph.D. (President of True North Research) will lead your survey research effort. Dr. McLarney has designed and conducted over 600 survey research studies for public agencies—including more than 250 studies for California municipalities and 200 revenue measure feasibility surveys. In total, the research that Dr. McLarney has conducted has led to over \$19 billion in successful local revenue measures using all types of revenue measures, including sales taxes, TOTs, UUTs, parcel taxes, bonds, business license taxes, benefit assessments, and property-related fees.

Dr. McLarney is a nationally recognized expert in survey research methodology, sampling theory, weighting and the use of statistical methods to generalize survey results. His research has been recognized at numerous national and state conferences, has been published in academic journals, and has earned him honors including the title of Visiting Scholar at the Institute of Governmental Studies at UC Berkeley.

Prior to co-founding True North Research in 2002, Dr. McLarney was the Director of Research at another survey research firm and a consultant for Quest, which provides organizational development training and consulting. Dr. McLarney holds an M.A. and Ph.D. in Government from Cornell University with an emphasis in survey methodology, sampling theory and public opinion, as well as a Bachelor's degree in Politics from the University of California, Santa Cruz.

From TRAMUTOLA:

Bonnie Moss, Executive Vice President and Senior Consultant--TRAMUTOLA. Bonnie has 25+ years experience in community and local government relations, campaigns and elections, marketing, and public relations. A graduate of Wellesley College, Bonnie spent 17 years working in corporate America and 8 years as an elected Trustee on the Hayward Board of Education prior to joining TRAMUTOLA. Bonnie has considerable expertise and success managing local tax elections and public sector communications. She has guided hundreds of successful campaigns in communities throughout California and the nation, including dozens of local tax measure campaigns throughout California, featuring the TRAMUTOLA model.

Steve Boardman, Account Executive. Steve specializes in serving TRAMUTOLA local government clients including city clients. He joined the firm in 2008 and has worked on dozens of local public agency projects in that time. Steve received his law degree from Northeastern University and his undergraduate degree from the University of Vermont. A native of Washington D.C. Steve was a writer for the Congressional Quarterly and later a Staff Attorney with Vermont Legal Aid. While there, Steve worked on fair housing and public benefits cases. Steve is an accomplished writer and an expert at utilizing political databases. Steve will serve as the TRAMUTOLA primary point of contact for this project.

C. PROPOSED SURVEY WORK PLAN & PROJECTED TIMELINE

INTRODUCTION TO SURVEY APPROACH: True North has developed a sophisticated research methodology for identifying whether voters will support a revenue measure and, if so, how best to package the measure for success. The key elements of our work plan and methodology are described in the following sections.

Although our research design is based on methods that are proven industry standards, our attention to detail and both the extent and manner in which we analyze the data are anything but standard. In addition to the types of deliverables that all research firms provide (i.e., a report and crosstabulations), we go the extra mile by using multivariate modeling to provide our clients with a much deeper and more reliable understanding of the factors that shape voters' opinions about a measure (see Modeling). Through our proprietary *Targeting Tool*, we are also able to put this information at our clients' fingertips in a way that helps them make sound, strategic decisions throughout the pre-electoral and electoral cycles. Our team is unique in providing these value-added services and look forward to discussing them in detail at the appropriate time.

COMMUNICATION: Before discussing the 'nuts-and-bolts' of the research design, we'd like to first briefly discuss our approach to communicating effectively with the City on this study.

At the outset of this study, we recommend having a kick-off meeting with all individuals who will be actively involved in the study (or will be an important stakeholder) in attendance. The kick-off meeting is a great forum for talking about past research conducted and the City's needs, expectations, and concerns for the upcoming survey and deliverables. The kick-off meeting will also provide an opportunity for Tramutola and True North to clarify any questions about the proposed methodology, ask questions of City staff, and identify changes to the methodology (as proposed) that may better serve the City's interests. In short, the purpose of the kick-off meeting is to make sure that everyone is in agreement about the details of the study, identify areas that need further clarification, share materials, and establish a more detailed work plan for the project.

After the kick-off meeting, our team will keep in regular contact with the Project Manager identified by the City through telephone, email, and in-person meetings. Dr. McLarney (True North) and Steve Boardman (TRAMUTOLA) will serve as the points of contact for the City on all matters related to this project and will provide frequent updates on the status of the project. These updates are generally made either by telephone or email, depending on the City's preference and the urgency of the topic.

SAMPLING METHOD: In revenue measure research, the first step is to identify the population of individuals who will vote on the measure, then survey a representative sub-sample of these individuals. The appropriate set of individuals to be included in the sample thus varies depending on a number of factors. The expected election date, for example, is one factor that has a large influence on voter turnout and the profile of participating voters. Many individuals who would be expected to participate in a general election are not expected to participate in primary elections, and an even smaller percentage are generally expected to participate in special municipal elections. Although there are 5973 registered voters currently in the City of Albany, 5651 are expected to cast a ballot in the November 2012 election, and fewer (3899) in the June 2012 election.

Based on the small size of the electorate and the election dates available for 2012, we recommend that the City base the sample on a broader turnout election (i.e., November 2012) as it will allow us to understand how the natural support for the proposed measure may change across several turnout scenarios/election dates (i.e., November 2012 or June 2012). Once the appropriate universe of voters is selected, the universe will be stratified by demographic characteristics that are known to influence voting behavior—such as partisan affiliation, household party composition, age, gender and geographic precincts. Voters will then be randomly selected into clusters within the appropriate strata. This sampling method ensures that the composition of the sample accurately reflects the composition of the electorate that is expected to participate in the elections of interest.

SAMPLE SIZE AND SPLIT-SAMPLING: By using a probability-based sampling design, Tramutola and True North will ensure that the sample is representative of likely voters in the City. The results of the sample can then be used to estimate the opinions of all likely voters in the City who are expected to participate in the election of interest. Because not all likely voters will participate in the survey, however, the results will have what is known as a statistical margin of error due to sampling. The margin of error refers to the difference between what is found from the sample of likely voters and what would have been found had all likely voters in the universe been surveyed.

This is where sample size becomes important. The larger the sample, all other things being equal, the smaller the margin of error and the more confidence one can have that the survey results accurately reflect the population of voters in the City. A sample of 300 likely voters will have a maximum margin of error at the 95% confidence level of +/- 5.5%. Stated differently, we can be 95% confident that the survey results will be within +/- 5.5% of what we would have found had we surveyed all likely November 2012 voters in the city.

If the City wishes to test distinctly different financial mechanisms in the survey (e.g., sales tax vs. TOT), we recommend using a *split-sample* approach to ensure an unbiased assessment of voter support for each mechanism. This involves providing a portion of the sample with one type of funding mechanism (e.g., sales tax), and a different portion with the alternative type (e.g., TOT). Research has consistently shown that interviewing the same respondent about several different types of funding mechanisms produces confusion and artificially low levels of support for whichever options are tested second (or third). For this reason, we recommend using a split-sample approach so that the survey produces reliable estimates of support for each type of funding mechanism.

QUESTIONNAIRE: Creating revenue measures that are ultimately approved by the necessary percentage of voters is difficult, especially in California. Successful measures require careful packaging—and it is in this area that the research performed by Tramutola and True North will be quite valuable.

Our team has developed a proven framework for the design of revenue measure survey instruments that captures the pieces of information needed for estimating the feasibility of a measure and, if feasible, identifying how best to package the measure for success. The instrument will identify the issues that voters feel are most important, how providing quality city services, facilities and economic development projects rank next to other important issues, baseline (uninformed) support for a measure, the tax threshold that voters will support, the projects and services that voters are most interested in funding, the information items that shape voter support for a measure, as well as how voter support for a measure may change once voters are exposed to the types of information they will likely encounter during the election cycle. Collectively, this will allow the team to determine if the City should move forward with a measure and, if so, the steps that should be taken to maximize the measure's chances of success—including choosing the right type of funding mechanism and tax rate.

Dr. McLarney and the TRAMUTOLA team will work closely with city staff in designing and finalizing the questionnaire. Our recommended questionnaire design process will begin at the kick-off meeting and take approximately ten days to complete. Dr. McLarney will take the lead in creating an initial draft and staff will have the opportunity to then review and comment on the draft questionnaire. It usually works best if the City assigns a single person to gather the comments of staff and then discuss them with Dr. McLarney, who will make changes based on the comments. This process is repeated, as needed, until all parties are satisfied with the questionnaire.

PRE-TEST AND CATI: Once a refined draft of the instrument meets the approval of the City, it will be pre-tested internally and with approximately 20 voter households in the City to ensure its integrity prior to finalization. The final survey will then be CATI (Computer Assisted Telephone Interviewing) programmed, which assists the interviewers by presenting question wording one question at a time, automatically navigating skip patterns, and requiring that only valid answers are recorded. Based on our experience, a 15-minute survey instrument will capture the necessary information for this project while at the same time avoiding the fatigue that can set in for a respondent with a longer survey.

DATA COLLECTION: Quality telephone interviewing will be an important element of the proposed survey. Using a ‘bargain’ phone facility is rarely a bargain, as the integrity of the data and the accuracy of the results depends on the knowledge, experience and professionalism of the interviewers and supervisors. In the end, it is critical that the research team and the City can trust the data that were collected. For this reason, True North teams only with MWRC—a firm that has worked with Dr. McLarney on more than 350 survey projects in the past and provides professional interviewers, quality data collection, and competitive pricing. Located in a university town with few alternative employment opportunities, MWRC interviewers tend to have higher education levels and are more motivated and professional than most facilities. Interviewing for a voter survey will generally be conducted in the evenings (5:30PM to 9:00PM PST) during weekdays, and 10:00AM to 6:00PM on weekends.

Dr. McLarney will work closely with the President of MWRC—Jesse Reinhold—to manage quality control procedures during data collection, which will include a training session with interviewers and supervisors to ensure that telephone interviewers understand the purpose of all of the questions in the survey, thoroughly testing the CATI program prior to fielding, active and remote supervisor monitoring of interviews, quality control checks on a random selection of interviews to identify any discrepancies that may occur (and need adjusting), and daily monitoring of the sample characteristics to ensure that data collection is adhering to the sampling plan.

DATA PROCESSING: Once the interviewing is completed, Tramutola and True North will process the data. This consists of checking the data for errors or inconsistencies, coding and recording responses, and preparing frequency analyses and cross-tabulations. If strategic oversampling is used during the sampling stage, True North will adjust for the oversampling via a statistical procedure known as weighting to ensure representative results.

TOPLINE REPORT: Once the data processing is completed, our team will analyze the results and prepare an initial topline report, which consists of the percentage results for each question asked in the survey. Although the topline report represents the 'first cut' at the data and presents the results only for respondents as a whole, the report will often allow the team to answer the essential questions for the study, such as does a measure have a reasonable chance to succeed.

SURVEY REPORT: The survey report prepared by True North for the City will include a thorough question-by-question analysis of the survey findings, an executive summary of the key findings and conclusions, a detailed discussion of the methodology used to complete the study, a copy of the topline report, and a complete set of crosstabulations for reference that display the results broken down by various subgroups of respondents. We believe that the quality of the final report and presentation reflects directly upon the quality of the study as a whole as well as the City and our team, so we take great care in developing a report which is thorough (300+ pages cover to cover), insightful, free of mistakes, and presents the information in an eye-catching, full-color display.

True North's reports are, without question, the most thorough and insightful in the industry. Our reports are designed to meet the needs of the most sophisticated audiences and critics, while at the same time are accessible to individuals who may not have the interest or the familiarity with the survey to wade through the typical 'academic style' report. We also don't just report the results—we put the findings into context and explain their meaning based upon related questions in the survey, as well as our experience working on hundreds of revenue measure studies in the State. Moreover, because the report will serve as a reference for decision-makers and possibly as a public relations tool for the City, we take care to create graphics that summarize information in ways that are both visually appealing and convey the results in an intuitive and easy-to-understand manner.

POLITICAL / ELECTORAL ANALYSIS: There are three possible outcomes of the Feasibility Survey Phase. Our team will advise the City on how to proceed based on the survey results.

1. **Most Positive** – Residents support a possible revenue measure and the City should move forward without delay to prepare for a 2012 ballot measure.
2. **Positive** – The proposal you envision enjoys support but greater public awareness of City needs is required prior to calling for a vote to better position your measure for success.
3. **Negative** – The public support needed for a successful election does not exist at this time. Alternatives must be explored and/or your plans must be re-worked in order to gain political support in your community.

The outcome of our Feasibility work will determine conclusions and recommendations for moving forward with future phases. Simply put, the evidence will tell us where we need to go. The City, of course, will maintain control over key decisions every step of the way.

COMMUNICATIONS SUPPORT DURING THE FEASIBILITY SURVEY WINDOW: As public opinion research is underway we will provide communications support. TRAMUTOLA has found that candid, honest communications are essential to building credibility with voters and the public. Even in the early phases of feasibility it will be important for the City to be open and transparent with voters and the public about what you are doing. Voters will need to understand the budget challenges that the City is facing, steps the City has already taken to meet those challenges, why the City is considering placing a revenue measure on the ballot, and what will happen if the revenue measure passes and what will happen if it fails. Additional TRAMUTOLA-driven communications support paralleling True North’s Feasibility Survey work could include:

- **EARLY Message Development.** TRAMUTOLA will work with you to assess your early communications needs and develop a specific messaging platform that guides how you publicly talk about your needs and this project. TRAMUTOLA believes in strict message discipline. Our goal will be to convince you to use your appropriate communication channels to deliver *these messages*, and *these messages* only. Our secondary goal in practicing message discipline will be to LISTEN. We will learn a lot just by LISTENING to your community.
- **EARLY Communications Tools.** TRAMUTOLA will help you develop **talking points, a Frequently Asked Questions (FAQ) sheet, fact sheet, PowerPoint presentation for speaking engagements, the City’s website, and other uses** to ensure a *unified* message – even in this early phase. It is especially important to note in this tough economy and tight budget climate, that you don’t have extra resources to spend on expensive communications, and a slick public relations effort will backfire when you are trying to convince the community of your needs.

SURVEY RESULTS PRESENTATION AND CONSULTATION: Our team will prepare and deliver a PowerPoint presentation of the study results, conclusions and recommendations to city staff and the City Council according to a mutually agreeable schedule.

PROPOSED FEASIBILITY TIMELINE – ASSUMING A 2012 ELECTION SCENARIO

We employ a team approach to ensure highest and best use of everyone’s time.

City Staff Role and Time Commitment. This project will require a deliberate investment of time from City project team members. We will ask you to appoint a small internal core planning team that will meet periodically with us to provide essential background, expertise and direction at key points in the process. We will work proactively with you to set a project schedule—including core team meeting dates—to ensure an effective, productive effort.

Work ethic. Work style. Our team has earned a reputation as one of the hardest working in the industry. In fact, our clients report in post-project client satisfaction interviews, “No one will work harder for you!” We will strive to be 100% accessible to you – 24/7. We will demand the best from ourselves and from all the people involved in your project. We will work hard to inspire and bring out the best in everyone assigned to your project.

Project Pacing. The process you are about to embark on comprises a significant investment in City resources. Preparing for and navigating through a local revenue measure project is organic. Things happen. Project teams must be nimble enough to respond to unforeseen developments. With that in mind:

- **We will appreciate and respect your process** – as we also remain mindful that the most successful political communications initiatives (especially tax elections) are always prepared for change.

- **Our TRAMUTOLA model teaches *The Discipline of Winning*.** *The Discipline of Winning* is driven by making measurable progress over time. We will advocate setting clear expectations – so everyone on the team is clear about individual responsibilities.
- **TIME: your most valuable resource.** We advocate using it wisely. TRAMUTOLA projects are driven by strategic timelines. We pace our work deliberately. Proper timing is built into the TRAMUTOLA model and strategy. We will work this model for you.

PROPOSED TIMELINE. Here is our “fast-track” **Feasibility Timeline**, assuming a **June 2012 election scenario**. Regardless, we recommend preparing the possibility of a longer Feasibility-to-Election timeline.

<input type="checkbox"/> December 21, 2012	Kick-off meeting
<input type="checkbox"/> January 5, 2012	Questionnaire finalized
<input type="checkbox"/> January 12, 2012	Survey goes into the field
<input type="checkbox"/> January 26, 2012	Survey/ data collection completed
<input type="checkbox"/> February 9, 2012	Date processing complete Topline Report delivered
<input type="checkbox"/> February 12, 2012	Survey Report/ Targeting Tool Delivered
<input type="checkbox"/> February 20, 2012	Presentation of findings to the Albany City Council
<input type="checkbox"/> TBD	City Council action calling for Election
<input type="checkbox"/> March 9, 2012	Filing Deadline – Mandatory!
<input type="checkbox"/> June 5, 2012	ELECTION DAY

D. COST PROPOSAL, BUDGET & FEES.

TRAMUTOLA and True North establish our fees based on a number of criteria including complexity of project, community characteristics, project scope and other factors. Our expenses are managed for maximum control and efficiency. Our Budget Proposal for Phase 1 Feasibility Survey services only, below, provides you with highest quality candid insight and advice about the City’s electoral options ***without committing the City FULLY to an election (along with the considerable resources that requires)*** until you are ready to move forward to future phases.

The following table presents a fixed-fee cost estimate to design and conduct the survey and the scope of work described in the proposal. The Costs shown are inclusive of all tasks needed to design and implement the survey, with the exception of travel oriented expenses which will be minimal and billed as incurred.

In the interest of comparing apples to apples, please also note that our costs include the value-added services (Targeting Tool and Statistical Modeling) that will not be offered or included in the proposals submitted by other firms. These value-added services will ensure that the City receives the most *accurate* and *insightful* research, and are critical for developing effective strategies for building and maintaining community support.

TASK	
Core Services	
Random Sample	\$450
CATI Programming	\$550
Telephone Interviewing	\$5,800
Data Processing/ Weighting	\$1,900
Analysis & Reporting	\$9,800
Project Management	\$4,500
Value Added Services	
Targeting Tool	Inc
Statistical Analysis	Inc
Strategy/Advice on Measure	Inc
TOTAL	\$21,000

Note: our team’s additional business related expenses for this project will not exceed \$1,500.00.

THANK YOU!

On behalf of all of us on the TRAMUTOLA Team, thank you again for your consideration. We are excited about working with the City of Albany to achieve your strategic and electoral goals. If you have any questions or need clarification on any aspect of our proposal, please don’t hesitate to contact Steve Boardman at (510) 658-7003 or via email at steveb@tramutola.com. We look forward to discussing next steps with you at your earliest possible convenience. Thank you again!