



GODBE RESEARCH
Gain Insight

PROPOSAL TO PROVIDE VOTER POLLING SERVICES

Presented to the City of Albany

December 8, 2011

FIRM BACKGROUND AND EXPERIENCE

Godbe Research Background

Firm Standing

Godbe Corporation, dba Godbe Research, is a California Corporation and is in good standing with the California Secretary of State. Godbe Research has never filed for bankruptcy during the life of the firm and has never been a defendant in any litigation or arbitration, past or current.

Corporate Structure

Godbe Research was founded and incorporated in January 1990. Godbe Research is not a subsidiary of a larger 'parent company' and the firm's two principals are the only two shareholders.

Corporate and Project Office:

Godbe Research maintains three offices, including our corporate offices in San Mateo, CA; as well as project offices in Newport Beach, CA and Bellevue, WA. All work for the City of Albany (Albany or City) will be performed from our locally available San Mateo office.

Number of Employees

Godbe Research has a total of nine (9) employees. Six employees work from our San Mateo office, two employees work from our Newport Beach office, and one employee work from our Bellevue, WA office.

Proposal/Contract Contact:

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Conflict of Interest Statement

Godbe Research does not have any current or foreseen clients or projects that could present a conflict of interest in providing the City of Albany with reliable and unbiased research services for the voter polling process.

Godbe Research Experience

Godbe Research, a State of California certified small business enterprise (SBE), was founded in January of 1990. The firm is a full-service public opinion research agency that offers its clients extensive experience in public opinion research for ballot measure/assessment feasibility studies, community needs assessments, public education and outreach strategies, strategic and general planning efforts, and public sector marketing efforts. Our offices in San Mateo (San Francisco/Northern California), Newport Beach (Southern California/Southwest), and Bellevue (Seattle/Northwest) house a staff of highly trained and experienced researchers (all Master's or Ph.D. level), and a commitment to providing superior quality research and client services.

The firm has been employed by public and private sector clients throughout the western United States, and the combined expertise of the Godbe Research team spans over 50 years in the field of public opinion research. The Godbe Research Team consists of the President and Principal Researcher (Bryan Godbe), Vice President of Business Development and Project Strategy, and a staff of Senior Research Managers, Senior Statistical Analysts, Research Analysts, and Research Associates. Each team member has the education and experience commensurate with their position at Godbe Research, and the team regularly teaches, authors, and speaks in the field of survey research. In short, you will not find a more experienced and educated team in public opinion research.

Godbe Research has conducted more than 2,500 research projects for local government agencies since our founding in 1990. In fact, we have specific experience with voter polling for dozens of successful California local government revenue measures, including sales taxes, utility users taxes (UUT), transient occupancy taxes (TOT), parcel taxes, business license taxes (BLT), and other funding mechanisms in general, special, and all mail ballot election cycles. Some of our most recent polling experience includes projects leading to **successful** revenue measures for the Cities/Towns of Oakdale (2011 general sales tax), Redwood City (2011 general BLT and TOT), McKinleyville CSD (2011 assessment), Cupertino (2011 general TOT and 2009 general UUT), Concord (2010 general sales tax), El Cerrito (2010 general sales tax and 2008 roads specific sales tax), Mammoth Lakes (2010 special UUT), Placerville (2010 special sales tax), Union City (2010 sales tax), Novato (2010 general sales tax), Tracy (2010 general sales tax), Campbell (2010 general TOT and BLT), San Rafael (2010 library and paramedic parcel taxes and 2009 library bond), San Leandro (2010 general sales tax), San Jose (2010 card room tax), Davis (2010 general sales tax), Mountain View (2010 general TOT), Newark (2010 general UUT), Atherton (2009 special parcel tax), Hayward (2009 general UUT), Banning (2009 general TOT), Palmdale (2009 general TOT), La Mirada (2009 general TOT), Half Moon Bay (2008 general TOT), and others since the economic downturn of mid to late-2008. In addition, we are also currently working with or have recently worked with the Cities of Moraga, Petaluma Lafayette, Hayward, South Lake Tahoe, Santa Maria, Yucca Valley, and others on voter polling for taxes or bonds for 2012.

Our experience in the City of Albany and in greater Alameda and Contra Costa Counties is just as diverse. In addition to providing voter polling services for the Cities listed above (Hayward, El Cerrito, Concord, San Leandro, Newark, and Union City) as well as for the City of Albany in 2002 and 2005, we've also provided polling for successful measures or are currently working with the West Contra Costa Unified School District, Livermore Valley Joint Unified School District, Newark Unified School District, Mt. Diablo Unified School District, Piedmont Unified School District, Hayward Unified School District, Fremont Unified School District, Dublin Unified School District, and others in the same 2008 to 2011 time frame.

The research that Godbe Research performs represents a vital tool for improving the success rate of revenue measures. Through survey research, the team can evaluate if cuts to City programs and services are more palatable than a voter supported funding mechanism; rank publically provided services in terms of satisfaction and importance to the community; determine or confirm the appropriate funding mechanism; assess baseline and informed support for a revenue measure or measures; determine if it is possible to place multiple measures on the same ballot or subsequent ballots; determine the specific projects that voters are most interested in funding; identify the arguments and features of a measure that increase support for the measure; determine whether there is a need for a public information campaign and the substantive content of the campaign; determine the best election cycle in which to place a measure on the ballot, as well as; determine the maximum tax threshold at

which the necessary proportion of voters will support a given revenue measure. Our tried and true approach has led to a successful passage rate of almost 90% for all revenue measures for which the firm has been the pollster. Moreover, this rate is for the 21+year life of the firm; in good times and in bad.

As an organization, Godbe Research is a small business (less than 15 employees) and we manage our commitments wisely. This means managing our project load so that our President and Principal Researcher (Bryan Godbe) can be directly involved in each project we conduct at the project manager level. Similarly, we do not take on so many projects that we need to move team members or remove team members from current projects. Thus, Godbe Research is committed to allocating the team members outlined in this proposal for the duration of the voter polling for the City of Albany.

PROPOSED SCOPE OF WORK

Godbe Research is a recognized leader in voter opinion research for California cities, school districts, counties, park and recreation districts and other local government agencies. The firm believes that a project's success depends on recognizing the individual needs of each client. To this end, Godbe Research has crafted the following project plan for Albany to illustrate the types of considerations that go into each of our research projects.

Research Objectives

Before beginning any research project, Godbe Research spends significant time reviewing the client's research objectives to choose the most appropriate research design. Based on preliminary information obtained from the City, Godbe Research understands that there are several research objectives, the most important of which include evaluating voter opinions and attitudes on revenue and policy issues facing the City of Albany. Additional research objectives will be refined between Albany and Godbe Research at the project kick-off meeting.

Scope of Work

Godbe Research is a recognized leader in public opinion and we have track record of providing polling for hundreds of local government revenue measures, which have generated hundreds of millions of dollars in funding for local government clients. We believe that any project's success depends on recognizing the individual and unique needs of each client. To this end, Godbe Research has crafted the following scope of work for the City to illustrate the types of considerations that go into each of our research projects. Accordingly, specific services for the survey of voters are envisioned to include:

- A project kick-off meeting with Albany, as well as additional meetings and conference calls, as needed, to discuss the research objectives of the study and other project tasks in detail.
- A review of Albany voter and resident demographics, polling and results on past ballot/revenue measures (both for the City and other agencies that also serve the City), and other data sources that will help to inform the questionnaire and sampling design for the polling study.
- Developing of a stratified and clustered sample of Albany voters, which could include all City voters or voters likely to vote in the November 2012 general election cycle, based on the City's research objectives for this study.
 - ❖ For reference, we have identified that there are a total of 9,680 voters in the City of Albany, of which 8,426 are expected to turnout for the November 2012 Presidential general election cycle. For comparison, approximately 5,122 voters have been identified as likely to turn out for the June 2010 Presidential primary election cycle.
- Designing and refining a survey instrument of between 15 and 18-minutes in length so that it addresses all of the research objectives of Albany for voter polling study. The survey instrument will be designed through an iterative process between the Godbe Research and the City.

- ❖ A 15 to 18-minute survey balances the data needed of the survey with the amount of time we can expect to keep a given voter on the phone and engaged in the process.
- Pre-testing the survey instrument to ensure that the questions and response codes are understandable to respondents, and to ensure that the survey length coincides with the budgeted survey length for the project.
- CATI programming the survey instrument for efficient and accurate data collection. While we program the survey instrument into a computer to allow for skip patterns and a reduction in potential errors, all interviews are conducted via a live interviewer in the Sacramento area.
- Training telephone interviewing personnel on the survey questionnaire and interviewing protocol, during an approximately one hour training session.
- Conducting approximate 15 to 18-minute telephone interviews with between 300 (n=300) and 400 (n=400) Albany voters according to a strict interviewing protocol.
 - ❖ Sample sizes of 300 to 400 voters will provide for a margin of error of no greater than +/-4.80% (400 interviews) to +/-5.57% (300 interviews) at the 95% confidence level and will provide us the ability to look at Albany voters as a whole, as well as by a variety of voter subgroups of interest (e.g. age, gender, individual and household partisanship, ethnicity, voting propensity, income, etc.).
 - ❖ The primary difference in the number of voters we recommend for this survey process will be based on the universe of voters we use for the study. If we use all City voters, then we would be able to conduct 400 total interviews. Should we use November 2012 likely voters as our universe, it might only be possible to conduct 300 total interviews. The final research objectives and budget for this survey should dictate the voting universe we employ for this specific study, and we can make a final recommendation to the City once we learn more about the project.
- Processing the data from the voter survey according to stringent quality control procedures, and weighting the data to adjust for population distribution, as needed.
- Meeting with the City of Albany to review the topline/aggregate survey results, which will help guide the analysis and reporting of data to be of maximum value to the City in moving forward with planning or policy decisions based on the survey results.
- Analyzing the survey results and preparing a comprehensive report of findings for Albany which directly addresses the research objectives outlined for this project. Our reports are customized to each client's unique research objectives and typically include a stand-alone executive summary (or highlights memo), methodology section, key findings and conclusions, applicable charts and graphics, as well as a complete set of crosstabulations for all questions asked in the survey and a copy of the survey questionnaire.

- Presenting the results and recommendations from the survey to Albany staff and administration, as well as the Albany City Council for up to three project presentations.
- Post project consulting with the City on the results and recommendations from the survey throughout any budgeting, planning, education/outreach, or revenue measure processes, as needed and at no charge. This service also applies to any outside consultants the City might engage for public education and outreach.

PROJECT TIME LINE

Because of our experience in conducting voter opinion research for a wide variety of clients including counties, cities, school districts, and other public agencies, Godbe Research can conduct a voter survey over about six to eight weeks, however, preliminary results can be made available much sooner, if required.

Below we have provided a general polling time line in number of days, which will be formalized into specific dates shortly after the project kick off meeting. Albany meetings (e.g. project kick off meeting) and tasks (e.g. questionnaire review) have been *italicized* for easy review.

<u>Project Task</u>	<u>Approx. Time</u>
<i>Project Kick-Off Meeting with Albany</i>	<i>1 Day (1 to 2 hours)</i>
Review of Previous Surveys and Data	2 to 3 Days
Questionnaire Drafting and Refinement	4 to 6 Days
Sample Development and Matching (concurrent with questionnaire drafting)	3 to 5 Days
<i>Meeting with City to Review Draft Survey</i>	<i>1 Day (1 to 2 hours)</i>
Questionnaire Revisions (if needed)	2 Days
Pretest and CATI Programming	2 Days
Data Collection / Interviewing (dependent on sample size)	3 to 5 Days
Initial Data Processing	2 to 3 Days
<i>Topline Report Meeting with Albany</i>	<i>1 Day (1 to 2 hours)</i>
Analysis and Reporting	8 to 10 Days
<i>Report/Recommendations Review w/ Albany</i>	<i>1 Day (1 to 2 hours)</i>
Report Changes (if needed)	2 to 3 Days
<i>Presentation of Findings to Albany Staff, Administration and City Council</i>	<i>Anytime After Final Report Submittal</i>
<i>Post Survey Consulting on Results with Albany and Other Stakeholders</i>	<i>Ongoing Through Election Day</i>

GODBE RESEARCH PROJECT MANAGER

Reliable polling results depend on having a firm that understands the complexities and nuances of survey research design, including sampling theory, questionnaire design, and data analysis. Indeed, although it appears easy to conduct a voter survey, it is in fact very difficult to design and conduct a survey where the resulting data are reliable measures of the opinions and behaviors one intends to measure, and the data can be accurately projected to the larger population of interest.

The team at Godbe Research is comprised of recognized experts in voter polling research design and implementation, and for this project we will assign our most experienced team members with the ability to add more should the need arise. For example, our Project Manager for this project, Bryan Godbe (President and Principal Researcher) has designed and conducted more than 150 survey research projects in the past three years alone, including projects for each of the client references listed in the previous section.

Bryan will execute all stages of the project, including sampling design and questionnaire development, overall project management, analysis, reporting, and presentations, and will be the day-to-day contacts for Albany staff and administration from Godbe Research. Bryan will be assisted by other Godbe Research team members, as necessary and a brief resume for Bryan has been provided below.

Bryan Godbe, M.A.
President and Principal Researcher

Founder of Godbe Research, Mr. Godbe has over 20 years of experience in public opinion research, public relations and government affairs. In this capacity, he has conducted public opinion and market research projects at the national, state, and local levels including projects for the Cities of Portland (Oregon), Tacoma (Washington), Henderson (Nevada), San Francisco, San Diego, Los Angeles, Sacramento, and San Jose (California).

Mr. Godbe received a Silver Anvil Award from the Public Relations Society of America for the development and implementation of an outstanding government affairs program on behalf of the Contra Costa Water District. This program was based on Mr. Godbe's extensive research including baseline research, focus groups and three tracking polls. In addition, Mr. Godbe was the pollster for recent taxes/bonds for the Cities/Towns of Hayward, El Cerrito, San Leandro Newark, and Union City, and is currently working with the West Contra Costa Unified School District, Dublin Unified School District, City of Mountain View, Hayward Unified School District, and others for measures in 2012.

Prior to founding the firm, Mr. Godbe was Vice President of Research at a California based public relations firm. Mr. Godbe also serves as the Senior Research Consultant at the Center for the Study of Los Angeles, at Loyola-Marymount University. He has a Master's Degree from the University of Michigan where he studied survey research methodology at the Institute for Social Research; and a B.A. degree from the University of California, Berkeley.

CLIENT REFERENCES

Below are several client references for the City of Albany to contact that demonstrate our experience with similar types of voter polling projects. Feel free to contact any of our references at your convenience, or let us know if you would like us to assist in making contact.

City of El Cerrito

Projects: 2010 Sales Tax Measure Feasibility Survey
2009 Sales Tax and Bond Survey
2008 Streets/Roads Specific Sales Tax Tracking Survey
2007 Bond/Parcel Tax/Sales Tax Feasibility Study (split sample)
2006 City Communications Survey
2004 UUT Measure Feasibility Study

Contact: Scott Hanin, City Manager
Phone: 510-215-4301
Notes: Our two most recent projects for the City of El Cerrito were polling for a successful specific (66.7%) sales tax for street/road improvements in the June 2008 election cycle, as well as polling on a successful general sales tax measure for November 2010.

City of Concord

Projects: 2010 Sale Tax Measure Feasibility Survey
2009 Voter Priorities and Revenue Measure Survey
2007 Housing Survey of Residents and Workers

Contact: Dan Keen, City Manager
Phone: 925-671-3150
Notes: Godbe Research was the pollster for the City of Concord's successful November 2010 sales tax measure.

Pleasant Hill Recreation and Park District

Projects: 2009 Bond Measure Feasibility Survey

Contact: Bob Berggren, General Manager
Phone: 925-682-0896
Notes: Bond measure passed at 66.7% in the August 2009 mail ballot special election cycle.

City of Hayward

Projects: 2010 City Satisfaction Survey
2009 Utility Users Tax Survey of Voters
2008 City Satisfaction Survey
2007 Revenue Measure Feasibility Survey (split sample)
2000 Revenue Measure Feasibility Survey

Contact: Fran David, Assistant City Manager
Phone: 510-583-4302
Notes: UUT passed in the May 19, 2009 Statewide special election when all up-ballot State revenue based measures failed. We are talking with the City about a bond measure polling process with a focus on 2012.

West Contra Costa Unified School District

Projects: Parcel Tax Measure Tracking Study 2010
Bond/Parcel Tax Measure Feasibility Study 2009
Parcel Tax Tracking Survey of Voters 2008
Parcel Tax Feasibility Survey 2008

Contact: Bruce Harter, Superintendent
Phone: 510-231-1101
Notes: Pollster for the District's 2008 parcel tax and 2010 bond measure, based on a two election strategy.

City of San Leandro

Projects: 2010 Tracking Survey of Voters
2009 Revenue Measure Feasibility Survey
Contact: Stephen Hollister, City Manager
Phone: 510-577-3390
Notes: Godbe Research was the pollster for the City's successful November 2010 sales tax measure.

City of Union City

Projects: 2010 Sales Tax Measure Tracking Study
2010 Revenue Measure Feasibility Study
Contact: Tony Acosta, Deputy City Manager
Phone: 510-675-5394
Notes: Godbe Research was the pollster for the City's 2010 sales tax measure.

Fremont Unified School District

Projects: Parcel Tax Measure Feasibility Study 2010
Bond Measure Feasibility Study 2001
Contact: Larry Sweeny, Trustee
Phone: 510-657-2350
Notes: Pollster for the District's successful November 2010 parcel tax (only one of only two parcel taxes to pass in November 2010).

Dublin Unified School District

Projects: Bond Measure Feasibility Study 2011
Parcel Tax Feasibility Study 2008
District Planning Study of Residents 2006
Contact: Dr. Stephen Hanke, Superintendent
Phone: 925-828-2551 ext. 8001
Notes: Godbe Research was the pollster for the District's first parcel tax, passed in the November 2008 general election cycle. We are currently working with the District on bond measure polling for 2012.

Piedmont Unified School District

Projects: 2009 Parcel Tax Measure Feasibility Survey
Contact: Constance Hubbard, Superintendent
Phone: 510-594-2600
Notes: Parcel tax measure passed in June 2009, along with a parcel tax consolidation measure on the same ballot.

PROJECT COST OPTIONS

Godbe Research takes great pride in delivering reliable and practical research projects 'on time and on budget'. In doing so, we prefer to provide a firm, fixed fee format for our cost proposals. This is because it would be hard to provide the pricing the flexibility in the six options below using an hourly format, without being overly confusing.

Based on our basic understanding of Albany's research objectives and goals for the polling, Godbe Research recommends that the City conduct an approximate 15 to 18-minute survey comprised of 300 (n=300) to 400 (n=400) voters, which will allow for analysis at the overall City level (all voters), as well as by voters who are likely to vote in the November 2012 election cycle. A sample size of 400 voters would provide for greater precision among various voter demographic subgroups and by geography, when compared to a sample size of 300 total voters, and would be feasible should we use all voters as our universe. If we use a likely November 2012 voting universe, then we would likely be limited to 300 total interviews.

The prices below reflect the all inclusive costs to complete the voter polling project-- the overall cost will not exceed those shown below, provided that parameters (survey length, sample size, etc.) of the project conform to those outlined in this proposal. Should project parameters or Albany needs change, we will be happy to provide amended costs prior to proceeding.

Option One: Survey of 300 (n=300) Albany Voters

<u>Project Task</u>	<u>15-min.</u>	<u>18-min.</u>
Listed Voter Sample	\$700.00	\$700.00
CATI Programming	\$1,060.00	\$1,190.00
Survey Pretest	\$150.00	\$150.00
Telephone Interviewing	\$5,820.00	\$7,020.00
Data Processing	\$725.00	\$850.00
Research Fee	\$6,500.00	\$6,500.00
Project Management	\$2,000.00	\$2,000.00
<u>Miscellaneous/Travel Expenses</u>	<u>\$150.00</u>	<u>\$150.00</u>
Project Total	\$17,105.00	\$18,560.00

Option Two: Survey of 400 (n=400) Albany Voters

<u>Project Task</u>	<u>15-min.</u>	<u>18-min.</u>
Listed Voter Sample	\$900.00	\$900.00
CATI Programming	\$1,060.00	\$1,190.00
Survey Pretest	\$150.00	\$150.00
Telephone Interviewing	\$7,760.00	\$9,360.00
Data Processing	\$800.00	\$925.00
Research Fee	\$7,000.00	\$7,000.00
Project Management	\$2,250.00	\$2,250.00
<u>Miscellaneous/Travel Expenses</u>	<u>\$150.00</u>	<u>\$150.00</u>
Project Total	\$20,070.00	\$21,925.00



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