

Proposal for Ballot Measure Consulting Services

Prepared for
The County of Sonoma Department of Health
Services

January 23, 2019

January 23, 2019

Rod Stroud, Assistant Director
Department of Health Services, Administration
3313 Chanate Road
Santa Rosa, CA 95404

Re: Proposal for Ballot Measure Consultant Services

Dear Rod,

Thank you for the opportunity to present a proposal from our consulting team to the Sonoma County Department of Health Services for the potential November 2020 funding measure to improve behavioral health and homeless services programming, treatment, and facilities. It's clear from reviewing your background materials that additional funding was badly needed even prior to the 2017 fires. Obviously, the situation has worsened and the need for additional funding has escalated.

As strong supporters of your cause and as consultants with a proven track record to secure voter-approved funding in Sonoma County, we are excited by the possibility of working with your team on this project.

TBWB Strategies is a non-partisan strategy and communications consulting firm that specializes in helping stakeholders and public agencies design and eventually pass revenue measures to support quality public services and facilities. The partners and consultants at TBWB have experience with over 430 successful tax measures that have raised over \$20 billion in voter-approved funding for public agencies across California.

While TBWB specializes in the areas of communications and messaging strategy, **EMC Research's** expertise lies in opinion research and identifying the willingness of the public to support a measure while **Maureen Middlebrook** has unmatched experience working with Sonoma County opinion makers to discuss priorities and reach consensus. Our fourth partner, **SCI Consulting Group**, is a public finance research and consulting firm whose primary expertise is the research, analysis and administration of assessments, fees, charges and taxes for public agencies.

All firms work well together and have extensive experience in Sonoma County. We have a proven track record of working with public agencies to significantly increase awareness of their role among residents, leading to more support for the mission and programs sponsored by these agencies.

Our team member, **Maureen Middlebrook**, wishes to claim entitlement to the County's Local Preference Policy for Services, as she has a valid physical address located within Sonoma County and she holds a valid business license within the jurisdiction.

I will serve as your primary point of contact for this proposal and potential contract and can be reached by cell phone at 415-308-0605 or via email at bbarnes@tbwb.com. Please don't hesitate to contact me if you have any questions or need additional information. Thank you again for the opportunity.

Sincerely,



Barry Barnes
Partner, TBWB Strategies
400 Montgomery Street, Suite 700
San Francisco, CA 94104

7.2 Background & Organizational Information

About TBWB Strategies

TBWB Strategies is a non-partisan strategy and communications consulting firm specializing in bond, tax and other public finance ballot measures supporting public programs, services and facilities. TBWB launched in 2005 as an offshoot of Terris Barnes & Walters Political Media, which has been winning campaigns in California since 1988. **TBWB Strategies is an S Corporation and has no current contracts with the County of Sonoma.**

Public Consensus → Winning Propositions

Passing taxes and assessments is different from typical political efforts. For example, candidates run campaigns to differ from their opponents and stand out from the crowd. When the issue is passing taxes, bonds and assessments, however, winning requires consensus: uniting people around shared priorities and values. We believe public consensus leads to winning propositions, especially for tax measures.

Experience

The partners and consultants at TBWB have experience with over 430 successful public finance ballot measures that have raised tens of billions of dollars in voter-approved revenue for public programs, services and facilities. The successful measures include bonds, parcel taxes, sales taxes, transient occupancy taxes, utility users taxes, assessments and fees. We help cities, counties, school districts, community colleges, parks, water and open space districts, fire districts, libraries, healthcare districts, transportation authorities and others.

Commitment to Client Service

We have found that a close partnership with attention to daily details is essential. We know public finance measures, and you know your community. We also understand that the reputation of your agency is at stake every time you seek funding from your community; it's not enough just to "win," but the campaign and the measure must help you strengthen your relationship with your community.

Management-Level Attention

When you hire TBWB, you work directly with our firm's management team. Unlike consulting firms with just one or two principals, we have six experienced management team members dedicated to client service. Your lead manager will be your principal contact throughout your project to give your ballot measure the attention it deserves. Additional support will always be available in the event the need arises.

In-House Design and Production

TBWB is one of the few firms in our industry that maintains an in-house Art Department and Production Department, to produce award-winning, creative concepts and attend to all the details required for efficient and timely delivery of printed materials. Our team will make sure

your materials are given the necessary attention to deliver your message to your constituents effectively and on time.

Multimedia Communications

Local residents receive their information in a variety of ways. We offer innovative multimedia communication plans that deliver your message through a combination of direct mail, email, online display advertising, pre-roll video advertising and social media advertising to ensure a thorough reach to voters and maximize visibility. TBWB has unmatched experience blending traditional and new media strategies to maximize the impact of your message.

About EMC Research

EMC Research is a full-service opinion research and strategic consulting firm serving a broad range of public and private sector clients since 1989. Our mission is to provide clients with strategic actionable recommendations using a thorough understanding of public and stakeholder opinion. With 46 professionals on staff, operating from offices in Oakland and six other US cities, EMC Research has been involved in thousands of surveys and hundreds of focus groups at all levels in its nearly 30-year history, ranging from political and public policy strategy polls to extensive market share and customer satisfaction surveys.

EMC offers a full range of qualitative and quantitative opinion research methodologies, including telephone surveys, online surveys, intercept surveys, mail surveys, focus groups, and one-on-one interviews. We are able to offer any of these in any language needed for our clients in the Bay Area, most frequently English, Spanish, Chinese, and Vietnamese. The range of data collection methods used help us provide the analytic services our clients need, including multivariate analysis, market segmentation, brand awareness, employee and customer satisfaction, behavior analysis, usage analysis, and campaign effectiveness.

About Maureen Middlebrook, Middlebrook Communications

Maureen Middlebrook, of Middlebrook Communications, has lived in Sonoma County since 1970 and knows her community well. In several positions that she held early in her career, with PG&E, Waste Management, Sonoma County Agricultural Preservation and Open Space District, Redwood Regional Medical Group, she functioned as the Communications Director and Media Spokesperson. She was responsible for how the community perceived the business/district and what the business/district could do for the community. In every position she made presentations to community groups, managed positive relations with the media and minor crises within them when they occurred.

For several years, she worked as a contract consultant to the Santa Rosa Chamber of Commerce, managing their political advocacy along with several committees. (Health, Education, Manufacturing) As an independent contractor, she staffed the local steering committee that successfully passed Measure M, the first sales tax increase dedicated to transportation improvements in Sonoma County. This was the first opportunity to work with

TBWB the consulting firm chosen by the Steering Committee to guide the measure's development and winning campaign. She worked with them again on the equally successful campaign to extend the sales tax that funds the Sonoma County Agricultural Preservation and Open Space District as well as Measure AA (bay restoration) in 2016 and RM3 in 2018.

About SCI Consulting Group

Established in 1985, SCI is a widely recognized public finance research and consulting firm with leading expertise in assisting public agencies in California to fund new services and improvements. SCI's primary expertise is the research, analysis and administration of assessments, fees, charges and taxes for public agencies.

With 33 years of experience in this specialized field, we have an unparalleled track record of identifying parcel-related revenues, based upon new and existing tax methodologies. Accordingly, SCI also works to help develop tax methodologies that are fair, equitable and administratively efficient, and optimize overall revenue.

SCI has worked extensively throughout Sonoma County, and currently provides, or have provided, assessment and special tax administration, as well as other consulting services to numerous public agencies within Sonoma County including the City of Petaluma and the Marin-Sonoma Mosquito and Vector Control District.

Aside from our administrative staff, every employee in our firm is a database expert. We have developed in-house, specialized programs to improve our research and levy administration services. We are also GIS and mapping experts.

7.3 Qualifications & Experience

TBWB Strategies: Sonoma County Experience

Over a Decade of Experience in Sonoma County

TBWB has worked with many public agencies in Sonoma County since 2002 and has helped pass multiple Sonoma County revenue measures. This understanding and experience have prepared us to effectively work with your community to garner input and build consensus, as well as inform voters and opinion leaders.

- **Bay Area Toll Authority—Counties of Alameda, Contra Costa, Marin, Napa, San Mateo, San Francisco, Santa Clara, Solano, and Sonoma:** 2018 Regional Measure 3, Toll Increase, 55.07% approval
- **San Francisco Bay Restoration Authority—Counties of Alameda, Contra Costa, Marin, Napa, San Mateo, San Francisco, Santa Clara, Solano, and Sonoma:** 2016 Measure AA, Parcel Tax, 70.32% approval
- **Sonoma Valley Unified School District:** 2016 Measure E, Bond, 70.4% approval
- **Cotati- Rohnert Park School District:** 2016 Measure C, Bond, 64.4% approval,
- **Cotati- Rohnert Park School District:** 2015 Measure B, Parcel Tax, 68.2% approval,
- **Cotati- Rohnert Park School District:** 2014 Measure B, Bond, 63.4% approval,
- **Petaluma Elementary School District:** 2014 Measure E Bond, 62.2% approval
- **Petaluma Joint Union High School District:** 2014 Measure C, Bond, 63.1% approval
- **Santa Rosa Junior College:** 2014 Measure H, Bond, 63.1% approval
- **Santa Rosa Junior College:** 2014 Measure A, Bond, 67.9% approval
- **Santa Rosa Elementary School District:** 2014 Measure L, Bond, 64.0% approval
- **Santa Rosa High School District:** 2014 Measure I, Bond, 69.1% approval
- **Cotati- Rohnert Park School District:** 2012 Measure D, Parcel Tax, 67.0% approval
- **Town of Windsor:** 2008 Measure N, Transit Occupancy Tax, 70% approval
- **Sonoma County Open Space District:** 2006 Measure F, Sales Tax, 75.7% approval
- **Sonoma County Transportation Authority:** 2004 Measure M, Sales Tax, 67.2% approval

TBWB Strategies: Housing Measure Experience

In recent years, as the housing crisis has escalated across the bay area, TBWB has had the opportunity to work with public agencies and committees at the local, county and state level to deliver badly-needed funding for housing solutions:

- **CA Proposition 1:** Statewide Affordable Housing Bond, November 2018
- **CA Proposition 2:** Statewide Mental Health Services Bond, November 2018
- **City of Emeryville Measure C:** Affordable Housing Bond Measure, June 2018
- **LA County Measure H:** Informational Effort for Countywide Measure H, Sales Tax for Mental Health and Homeless Services, March 2016
- **San Mateo County Measure K:** Sales Tax to Benefit Affordable Housing, November 2016

EMC Research: Sonoma County Experience

In addition to EMC's work for the **Sonoma County Community Development Commission** related to the Homes for All project, EMC has a wealth of experience conducting research among Sonoma County voters and residents.

For fifteen years, EMC Research has conducted bi-annual, bilingual (English and Spanish) telephone surveys for the **Sonoma County Water Agency** to gain insight into Sonoma County residents' awareness and opinions about the Agency, local water supply and other related issues. Our research has included measuring voter support for potential countywide ballot measures related to water.

In 2017, EMC conducted an intercept survey of residents in select Sonoma County neighborhoods on behalf of the **Sonoma County Department of Health Services**. The goal of this research was to understand motivations for using SNAP-Ed programs in order to increase participation in these health education programs.

EMC has also provided surveys of voters in Sonoma County on behalf of the **Nonprofit Housing Association of Northern California** to help determine the viability of potential housing bond measures within the County.

EMC Research: Housing Measure Experience

EMC's experience on issues related to affordable housing, supportive housing and homelessness is unmatched. We have conducted research statewide and in communities throughout California to understand voter attitudes as they relate to building more affordable housing, the level of concern about housing accessibility and affordability for vulnerable populations, explored the complicated topic of homelessness and mental health, and tested willingness of voters to tax themselves to fund affordable housing and homeless services. Our polling and strategic consulting has led to successful measures to address housing affordability and homelessness including:

- **CA Proposition 1:** Statewide Affordable Housing Bond, November 2018
- **CA Proposition 2:** Statewide Mental Health Services Bond, November 2018
- **City of Berkeley:** Measures O & P, Affordable Housing Bond and Transfer Tax, November 2018
- **City of Emeryville:** Measure C: Affordable Housing Bond Measure, June 2018
- **Santa Clara County:** Measure A: \$950M Affordable Housing Bond, November 2016
- **San Francisco:** Measure A: \$310M Affordable Housing Bond, November 2015
- **Alameda County:** Measure A1: \$580M Affordable Housing Bond, November 2016
- **City of Oakland:** Measure KK: \$600M Infrastructure Bond, November 2016

EMC also worked **directly with the Sonoma County Community Development Commission** in 2016 on a poll leading up to the “Homes for All” summit. The poll explored community perceptions and priorities around housing and homelessness, support for the concept of providing homes for all, and willingness to pay for such a program through various mechanisms.

Some other recent clients for whom EMC has conducted housing related research include:

- Bay Area Council
- San Francisco Bay Area Planning and Urban Research Association (SPUR)
- Nonprofit Housing Association of Northern California
- San Francisco Foundation
- Tipping Point

Maureen Middlebrook: Sonoma County Experience

Earlier this year, Ms. Middlebrook served as the District Coordinator for Sonoma and Marin Counties, under the leadership of TBWB Strategies, the selected consulting firm for successful Regional Measure 3, a toll increase on state-owned bridges that will fund transportation improvements throughout the Bay Area. While seemingly straightforward, it was Ms. Middlebrook’s responsibility to educate local community groups and individuals of the significant benefits of the measure, while calming concerns of factions that always arise in elections. A critical component for success is to accumulate support for the measure by encouraging significantly diverse and known leaders in the community to publicly support it. The work requires the ability to choose the right voices, excellent listening and presentation skills, the creation of venues to share knowledge, negotiating among diverse groups with diverse needs, the willingness to go anywhere to speak to any groups or individuals to educate and the ability to discern and share legitimate community concerns among all stakeholders.

In 2016, Ms. Middlebrook served a similar role with TBWB Strategies for Measure AA, the first Bay Area-wide measure of its kind - a sales tax increase that is funding improvements to wetlands throughout the Bay. During this campaign, she additionally managed a local Sonoma County Steering Committee in support of the measure. Perceived as an “environmental” measure by some, Ms. Middlebrook worked with the business community and others to help them understand the benefits to them as well. This experience is very important as there will be similar issues in explaining the potential measure that will evolve from this RFP to diverse communities within Sonoma County. The benefits will not be obvious to all and will need to be carefully defined and communicated. Another critical task for each of the Bay-Area- wide measures accomplished by Ms. Middlebrook, was to select and then educate and convince ten very diverse members of the County to publicly sign a statement of support in the voters’ pamphlet. These recognized leaders need to reflect all aspects of the community and agree to a single support statement or rebuttal to opposition. The measure to be considered and,

hopefully developed, by the selected consultant to this RFP will need the same careful, sensitive, creative and proven thinking that went into these two successful measures.

SCI Consulting Group: Sonoma County Experience

SCI has worked extensively with the parcel data throughout all of Sonoma County and has provided annual parcel assessment administration services to Marin-Sonoma Mosquito and Vector Control District since 2000. As a result, SCI maintains an extremely accurate database of Sonoma County parcels, including some attributes not maintained by the County Assessor.

SCI will use our proprietary database, and our experience working with Sonoma County parcel data to research, analysis and report on different revenue options, scenarios and methodologies, and make recommendations that optimize revenue while ensuring fairness, equity and efficiency.

7.3.2 References

For TBWB Strategies, EMC Research, and Maureen Middlebrook:

David Lewis, Executive Director, Save the Bay
1330 Broadway, Suite 1800
Oakland, CA 94612
Phone: 510-463-6850
Email: dlewis@savesfbay.org

Jim Wunderman, President & CEO, Bay Area Council
353 Sacramento St.
San Francisco, CA 94111
Phone: (415) 946-8702
Email: jim@bayareacouncil.org

Dave Koehler, Executive Director, Sonoma Land Trust
822 Fifth Street
Santa Rosa, CA 95404
Phone: (707) 526-6930
Email: info@sonomalandtrust.org

For TBWB Strategies and EMC Research

JR Starrett, Advocacy and Community Engagement Director, Non-Profit Housing Association of Northern California
369 Pine Street, Suite 350
San Francisco, CA 94104
Phone: (415) 989-8166

Susan Hsieh, CPA,
Finance Director/Treasurer
City of Emeryville
1333 Park Avenue
Emeryville, CA 94608-3517
Phone: (510) 596-4352
Email: shsieh@emeryville.org

For TBWB Strategies:

Dr. Frank Chong, President/Superintendent of Santa Rosa Junior College
1501 Mendocino Ave.
Santa Rosa, CA 95401-4395
Phone: (707) 527-4011

7.3.3 Letters of Support

On behalf of TBWB Strategies, EMC Research, and Maureen Middlebrook from:

David Lewis, Executive Director, Save the Bay
Jim Wunderman, CEO, Bay Area Council
Dave Koehler, Executive Director, Sonoma Land Trust

On behalf of TBWB Strategies from:

JR Starrett, Advocacy and Community Engagement Director, Non-Profit Housing Association of Northern California

On behalf of EMC Research from:

JR Starrett, Advocacy and Community Engagement Director, Non-Profit Housing Association of Northern California



December 1, 2018

Rod Stroud, Assistant Director
County of Sonoma Department of Health Services
Administrative Services Division
3313 Chanate Road
Santa Rosa, CA 95404

Dear Mr. Stroud:

Save The Bay is the region's largest organization working to protect and restore San Francisco Bay for people and wildlife, since 1961. As you may know, Measure AA in June of 2016 was the Bay Area's first-ever nine-county parcel tax, creating \$500 million in funding for the San Francisco Bay Restoration Authority over 20 years. This measure was placed on the ballot in January of 2016 following a decade of research, enabling legislation, community outreach, message development and voter persuasion led by Save The Bay at the head of a large coalition of community organization, local government and constituency leaders.

Based on our experiences throughout this time period, I am proud to recommend the professional team of TBWB Strategies, EMC Research, and outreach coordinator Maureen Middlebrook. All three played important roles in our Measure AA victory, and I have confidence they would bring the same level of professional attention, creativity and dedication to your effort. I'm pleased to provide short summaries of their work on that effort.

EMC Research conducted an initial public opinion survey for Save the Bay in 2006, which we used to show opinion leaders that voters would be willing to support public funding to improve the Bay. This helped us build crucial support for creation of the San Francisco Bay Restoration Authority through a statute we pressed the state legislature to approve, which was signed by Governor Arnold Schwarzenegger in 2008. In 2011, EMC conducted focus groups and phone surveys to understand voter perceptions of the Bay, including geographic differences in attitudes in each of the nine counties. We used additional surveys in 2013 and 2014 to aid strategic decisions around the best timing, duration, and tax amount for a Bay restoration funding measure by the Restoration Authority. Additional EMC polling and focus groups in 2015 and 2016 were critical to honing the text and purposes of that measure, shaping its final placement on the ballot, and informing the messaging used during the campaign to secure voter support.

TBWB Strategies served as pre-election strategic consultants to Save the Bay from 2012 until placement of the measure on the ballot by the Restoration Authority in January 2016. In this role, TBWB worked with Save The Bay and our coalition of stakeholders throughout the Bay Area, with the Restoration Authority, and the California State Coastal Conservancy, to advise on the development of a measure that would resonate with voters across the region. Later, as general consultants to the campaign, TBWB devised an ambitious and innovative strategy to communicate with likely voters and mobilize likely supportive voters, leading a campaign team that included specialists in research, fundraising, television, digital and field.

As General consultants to the Measure AA Campaign, TBWB developed and managed a nine-county field operation to ensure participation and buy-in from all corners of the Bay. **Maureen**



Middlebrook served as TBWB's Sonoma County outreach coordinator during the campaign, and received high marks for her work to engage and activate many Sonoma County environmental and conservation organizations and leaders in our effort. While we knew that Sonoma County would be one of the more challenging geographies for Measure AA, Maureen's work led to a strong enough level of support from the County to ensure an overall victory region-wide. Thanks to the work of this team, Measure AA passed with over 70% of the vote. Our region and the Bay will benefit for generations to come.

Please let me know if you have any questions regarding my experience with this team.

Thank you,

David Lewis
Executive Director



December 2, 2018

To: Rod Stroud, Assistant Director
County of Sonoma Department of Health Services
Administrative Services Division

Fr: Jim Wunderman, CEO, Bay Area Council

Re: TBWB Strategies/EMC Research/Maureen Middlebrook

Dear Rod,

As a co-chair of the Keep the Bay Area Moving/Yes on RM3 committee, I would like to wholeheartedly endorse the team of TBWB/EMC/Maureen Middlebrook as they will be submitting a response to your department's RFP for research, outreach and consulting services.

In June of 2018, Regional Measure 3 passed across the 9 county region with over 55% of the vote. Passage of this important measure will raise bridge tolls by \$3 over 6 years and generate \$4.5 Billion for transportation projects across the region including important projects in Sonoma County. The Bay Area Council was proud to join SPUR and the Silicon Valley Leadership Group in leading this effort which was also supported by a broad coalition including many environmental, labor, and community organizations.

All three members of this team played critical roles in the success of RM3. An immediate benefit of this team was the fact that all three worked with Bay Area Council and others to help us pass the Bay Restoration Measure AA in 2016. RM3 was placed on the ballot after more than a year of opinion research by **EMC Research** for the Metropolitan Transportation Commission (MTC). The information gathered from this work led to the development of an expenditure plan and messaging that reflected the priorities of voters across the Bay Area as well as within each county. In the fall of 2017, **TBWB Strategies** was selected as the General Consultants for the RM3 campaign effort. In this role, they assisted our coalition (including agency staff) in refining and then communicating the most compelling messages to the public. Once the campaign committee was formed in January of 2018, TBWB served the role of lead strategists for the effort, overseeing all components of the campaign on a daily basis including field operations, fundraising, earned and paid media, endorsements, etc. Early in the campaign, TBWB brought on **Maureen Middlebrook** to manage both Sonoma and Marin County outreach for the campaign. Maureen's hard work paid dividends as we finished with 53% and 60% of the vote in Sonoma and Marin counties respectively.

Please don't hesitate to let me know if you have any questions regarding our experience with this well-qualified and hard working team of professionals.

Thank you

A handwritten signature in black ink, appearing to read 'Jim Wunderman'.

Jim Wunderman
CEO, Bay Area Council



November 30, 2018

Department of Health Services
County of Sonoma

Dear Friends at Health Services:

In 2016, Terris, Barnes and Walters (TBWB Strategies), managed a successful Bay Area-wide campaign to pass Measure AA that was the first measure to be placed on ballots in all nine Bay Area counties. Measure AA was a sales tax increase that created vital funding to protect existing and create new wetlands around the Bay. Sonoma Land Trust (SLT) was a major supporter and TBWB Strategies' multi-county communications structure was key in leading to the measure's success.

Each County had a district coordinator and Maureen Middlebrook, an active community member since moving here in 1970, was Sonoma County's. SLT worked in partnership with Maureen and the campaign. She chaired the local Steering Committee that met here at the SLT office. She created many opportunities for community outreach, then making presentations herself or creating venues for SLT staff members to educate the community on the critical need for the measure. Maureen was the liaison for Sonoma County with the Bay Area-wide campaign and kept the Committee informed on its strategies and resources. She also worked easily and successfully with elected officials and community leaders, requesting their public support of the measure in the voter pamphlet.

While I wasn't involved, I am also aware that EMC Research, another partner on TBWB Strategies team, served as the pollster in building Measure AA, gathering valuable data from voters as to the priorities they wanted to see in the plan, which obviously contributed to its success. If the situation arose, SLT would be pleased to be associated with these individuals again.

Sincerely yours,

Dave Koehler
Executive Director

**Executive Director
Amie Fishman**

**BOARD OF DIRECTORS
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Jacquie Hoffman
Mercy Housing
Management Group**

**Vice President
Joshua Simon
East Bay Asian Local
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Eden Housing**

**Michele Byrd
City of Oakland**

**Carlos Castellanos
MidPen Housing**

**Candice Gonzalez
Palo Alto Housing**

**Matt Huerta
Matt Huerta
Consulting LLC**

**Janice Jensen
Habitat for Humanity
East Bay/Silicon Valley**

**Katie Lamont
Tenderloin Neighborhood
Development Corporation**

**Marianne Lim
Burbank Housing**

**Jacky Morales-Ferrand
City of San José**

**Matt Schwartz
California Housing
Partnership**

**Smitha Seshadri
BRIDGE Housing**

**Joseph Villarreal
Contra Costa
Housing Authority**

**Dan Wu
Charities Housing**

**Kevin Zwick
Housing Trust
Silicon Valley**

November 29, 2018

Department of Health Services
Sonoma County
3313 Chanate Road
Santa Rosa, CA 95404

Whom It May Concern:

I understand that TBWB Strategies has assembled a team of professionals that will be submitting a proposal in response to Sonoma County's RFP for Consultant Services related to a potential November 2020 ballot measure that could generate needed funds to sustain and improve behavioral health and homeless services in the county. TBWB is partnering with EMC Research on this proposal and I address EMC's many strengths in a separate letter.

NPH has worked with TBWB Strategies on two of our most successful recent efforts to secure funding for affordable housing - San Mateo County's Measure K sales tax in 2016 and California Propositions 1 and 2 in 2018. Based on the success of these measures and the insight, leadership and expertise TBWB brought to the team I am pleased to recommend the firm for the work you're about to embark upon.

In the case of San Mateo County's Measure K, TBWB worked with NPH, county staff, elected officials, and county stakeholders for many months prior to placement of the measure on the ballot. Much of what they did in this role matches with the needs described in your RFP- working with a pollster to determine what type of funding mechanism voters would be willing to support, refining the most important messages to be communicated during the community outreach phase and working to balance the needs and priorities of everyone around the table in order to reach consensus on a path forward. Once the Board of Supervisors placed the measure on the ballot, TBWB transitioned to serve as campaign consultant to the privately financed committee that was formed to advocate for passage of the measure. With TBWB's daily guidance, the committee was able to raise \$1.2 Million for the campaign and passed Measure K with over 70% of the vote.

More recently, NPH was very involved with the coalition working on behalf of state Propositions 1 and 2 in 2018. In the Spring of 2018, TBWB was hired to serve as General Consultants to the campaign committee, a role they served through the successful passage of both measures in November 2018. TBWB's leadership and creativity in this role was an important component of the important victory that will generate \$4 Billion in general obligation bonds to construct affordable housing throughout our state, including Sonoma County.

TBWB's lead partner on this effort would be Barry Barnes, who I have directly worked with since the spring of 2014. I am confident that you will be in good hands if TBWB is selected for your effort. Please don't hesitate to contact me if you have any questions.

Sincerely,



JR Starrett
Advocacy and Community Engagement Director

Executive Director
Amie Fishman

BOARD OF DIRECTORS
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Andy Madeira
Eden Housing

Michele Byrd
City of Oakland

Carlos Castellanos
MidPen Housing

Candice Gonzalez
Palo Alto Housing

Matt Huerta
Matt Huerta
Consulting LLC

Janice Jensen
Habitat for Humanity
East Bay/Silicon Valley

Katie Lamont
Tenderloin Neighborhood
Development Corporation

Marianne Lim
Burbank Housing

Jacky Morales-Ferrand
City of San José

Matt Schwartz
California Housing
Partnership

Smitha Seshadri
BRIDGE Housing

Joseph Villarreal
Contra Costa
Housing Authority

Dan Wu
Charities Housing

Kevin Zwick
Housing Trust
Silicon Valley

November 29, 2018

Department of Health Services
Sonoma County
3313 Chanate Road
Santa Rosa, CA 95404

Whom It May Concern:

This letter of support serves to attest to EMC Research's high quality research services. We would not hesitate to recommend EMC to the Sonoma County Department of Health Services.

We have worked with EMC on numerous occasions. The firm has provided research investigating voter attitudes about housing, homelessness, mental health and supportive services, and the feasibility of revenue measures to combat housing inequality and homelessness. EMC's polling set the stage for successful affordable housing and homeless services measures in Santa Clara County (Measure A, 2016); Alameda County (Measure A1, 2016) and most recently in the City of Berkeley (Measures O and P, 2018). We have also worked with EMC to evaluate Sonoma County voters' opinions and attitudes related to funding for affordable and supportive housing.

EMC offers high quality research, innovative methods, and outstanding consultation services. With EMC on your team, you get more than just research, but also a partner who is invested in helping you achieve your goals. Their focus is on designing research that can be used, and delivering clear, concise results.

EMC Research's experience conducting research in the area of housing and homelessness is unmatched. We would turn to them for any research needs on these topics.

Please feel free to contact us with any questions.

Sincerely,



JR Starrett
Advocacy and Community Engagement Director

7.3.4 Debarment

None of our firms have faced debarment or disqualification of any kind.

7.3.5 Cultural Competence

In addition to our many years of conducting research among residents of Sonoma County, EMC Research has nearly three decades of research in the areas of housing, homelessness, healthcare, wellness, and public health, including research on behalf of nonprofit housing organizations, public entities, public health programs and campaigns, medical associations, and public and private hospitals and healthcare systems. Much of our work has been in the extremely diverse Bay Area, and this range of topics and clients has given us a strong understanding of how to design research for diverse and hard to reach populations. This includes professional translation services and pretesting of survey language to prevent use of culturally insensitive language. EMC Research also employs full-time staff members who are fluent in Spanish and Chinese to help review language used in our research instruments. We have used creative, methodologically sound methods for capturing data from hard-to-reach and extremely diverse, targeted, and sometimes hidden populations such as:

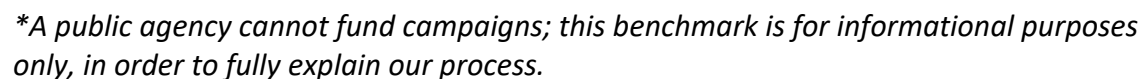
- Non-English speakers
- Immigrant, minority, or other specialized populations
- Uninsured adults
- Low-income adults
- Drug users
- Adults in engaging in high-risk sexual behavior
- Seniors and people with disabilities
- Young adults and teens

Our work in this area has been extremely varied, both in terms of the clients we have served, as well as the strategic challenges our research was designed to address. A sampling research we have done includes:

- Multi-lingual community and voter surveys regarding support for programs and ballot measures
- Intercept surveys in English and Spanish of SNAP-eligible Sonoma County residents about interest in health topics, food purchasing behaviors, knowledge of County-sponsored food education classes, and barriers to accessing fresh, healthy foods
- Intercept surveys, telephone surveys, and focus groups with Medicaid recipients and Medicare Advantage members about access to health care
- Member satisfaction surveys for members in Medicaid plans, State Children's Health Insurance Plans (SCHIP), and dual eligible plans
- Phone and web surveys of doctors and healthcare providers on issues regarding patient care, appointment availability, prescription drugs, and other pertinent issues
- In depth interviews among public school parents to improve vaccination rates

- A large-scale telephone survey of American adults on issues regarding mechanisms for accessing prescription medications
- Multi-modal research and ad testing on behalf of campaigns seeking reduce DUIs, pedestrian deaths, and speeding
- Qualitative focus groups testing public health campaigns around smoking cessation (including for pregnant women), marijuana use prevention, and suicide prevention

TBWB Approach



1 Feasibility Study

2 Build Consensus

3 Build a Strong Measure

4 Campaign for the Win

Start

Call for Election

Election Day

TBWB, EMC Research and SCI Consulting will help you answer:

- We often like to involve key stakeholders from the County and from the community in the process of developing the survey so that they become invested in the finance measure process from the very beginning. Once the survey data is collected and analyzed, we will provide detailed recommendations to you for moving forward with a funding measure.

Build Consensus



If the Feasibility Study results in a green light for moving forward with a funding measure, we generally recommend a public information and outreach program to educate the community about your needs and build broad consensus around a solution. Maureen Middlebrook and TBWB will work with you to develop and execute this plan.

TBWB and Maureen Middlebrook will:

- Develop information-only messaging and a plan for getting the message out to key audiences
- Provide information to be added to your website, distributed through social media and included in newsletters
- Prepare presentations and talking points for community meetings
- Write, design and produce informational mailings to educate, inform and engage voters
- Develop strategies and plans to inform and engage key internal stakeholder groups within your agency
- Develop strategies and plans to inform and engage influential external groups, including current and former elected leaders, local business and industry leaders, key neighborhood leaders, faith community leaders, taxpayer groups and others

Build a Strong Measure



Once we know what a viable, winnable funding measure looks like, TBWB will work with you, your financial advisors and your legal advisors to develop the specific details of your measure and qualify for the ballot.

Specifically, TBWB and SCI Consulting Group will:

- Work with you and your financial team to finalize amounts, tax rates and the structure of your measure
- Refine your projects to make sure they are written in clear and understandable language and feature projects and programs that are high priorities for your community
- Work with you and your legal team to develop important taxpayer accountability protections, including an independent citizens' oversight committee and public reporting process
- Work with you and your legal team to develop all resolutions required for calling the election
- Develop the critical ballot question that will appear on ballots
- Develop and refine the full text of the measure and other materials that will appear in the ballot pamphlet mailed to all voters
- Present recommendations and documents to your Board of Supervisors for formal approval
- Work with the County Clerk and elections officials to qualify for the ballot

Campaign for the Win



The next step in the process is to mount a strategic advocacy campaign to secure the votes needed to win on Election Day. As consultant to volunteer campaign committees, we build campaign plans with the following elements to ensure the best possible chance of success on Election Day:

- **A winning plan for you.** We pride ourselves in developing unique plans for every client as opposed to applying a “cookie cutter” model that may have worked in other places or at other times.
- **Effective messaging and materials.** Campaign logos, brochures, websites, social media, online advertisement and other materials must be eye-catching and have a local feel in order to persuade and motivate voters effectively.
- **Avoiding controversy and obstacles.** We can’t take anything for granted in today’s economic and political environment. To win, it is important to run an organized campaign that avoids controversy and neutralizes opposition to the extent possible.
- **Good teamwork.** Above all, winning campaigns take good teamwork. We work closely with pollsters, professionals, committee members and other local partners.
- **Efficient grassroots organizing.** The time and energy of your volunteers are precious resources. We’ll work with you to develop a plan that maximizes the impact of their efforts on the outcome of the election.
- **Strong Fundraising.** Fundraising for local ballot measures can be a challenge. It takes resources to get your message out to the voters who will determine the outcome of your election. We can help you create a fundraising plan to help you achieve the resources needed to win.

**A public agency cannot fund campaigns; this benchmark is for informational purposes only, in order to fully explain our process.*

EMC Approach: Public Opinion Poll

The goal of the research will be to provide scientifically valid data regarding the opinions of Sonoma County voters related to a potential revenue measure to fund behavioral health and homeless services.

The research will provide you with scientifically sound data to inform strategic decisions such as:

- How should a measure be structured in order to most likely meet with success?
- What is the appropriate timing and amount for a measure?
- What are the types of projects that are most important to those who will vote?
- What are the themes and messages that will assist in reaching a successful outcome?
- Would the measure be vulnerable to opposition?
- What are suggested areas for public education and community outreach?

The RFP mentions the possibility of a sales tax measure for the November, 2020 ballot. Planning for a public opinion poll in early 2019 is prudent because you will have the results early enough to alter your plans if the data suggests something other than what you initially planned on is the most viable option. You would also retain the option to do a tracking survey later in 2019 or in early 2020, closer to the election.

EMC Poll Methodology

We recommend a mixed-mode/hybrid methodology where we will conduct interviews by phone and by email-to-web modes. These modes complement each other well; we are able to obtain data from a broad cross-section of likely voters because those who may not answer their phone may take the survey online, and those who do not respond to the email survey invitation may take the survey over the phone.

To conduct the online portion of the survey, EMC would pull a list of target voters with email addresses from a sample vendor that maintains a robust voter file with email addresses and supplements the email list with commercial lists. We will send an email invitation to respondents that includes a web link to take the survey. We take several steps to ensure that our online voter survey respondents are demographically representative of likely voter universes through targeting reminders via email to harder to reach populations.

Given the scope of information needed, we estimate an average interview length of 15 minutes will be required. We recommend including the option to complete the interview in English or Spanish.

As requested in the RFP, we will provide a sample size of 400 interviews among likely voters in the County. A sample size of 400 carries a margin of error of plus or minus 4.9 percentage points at the 95% confidence level. While a sample size of 400 interviews is sufficient to provide reliable results overall, EMC would be happy to provide pricing and explain the benefits of other

options as needed. For example the County may wish to consider a larger sample size to allow for greater confidence in the reliability of results within key subgroups such as urban and suburban voters versus more rural voters, older versus younger voters, high-frequency versus lower frequency voters, Democrats versus Independents versus Republicans, and other distinctions.

EMC Scope of Work

EMC's services related to the public opinion poll include:

- Working with the consultant team and County staff to design and prepare survey instruments that address the project goals;
- Drawing computer-generated random samples of likely voters in the County;
- Testing questionnaires and other research instruments for clarity of questions, and revisions as necessary;
- Providing professional translation of research instruments into Spanish;
- Collecting survey data through interviews conducted in English and Spanish by telephone from a central telephone bank, supervised by an on-duty supervisor;
- Adapting the questionnaire for web application; programming and hosting the survey using professional survey software; managing the deployment of survey invitations via email; and collecting survey responses online;
- Coding of open-ended responses, if any, for computer analysis;
- In-depth analysis of data;
- Tabulating survey results, designing and generating cross-tabulations and other statistical tables as needed;
- Preparing reports of research results in PowerPoint and additional executive summary presentations or memos as needed;
- Meeting with the project team, County representatives, boards, and others as needed to present and review research results, and discuss the applications of findings to future strategy decisions;

Middlebrook Communications Approach

Ms. Middlebrook's initial steps involve meeting with DHS and CDC Leadership to hear their vision and a summation of the process that brought them to creating the RFP.

Once Ms. Middlebrook understands the vision and how the DHS and CDC work together, she would put together a list of community leaders throughout the County, making sure the diversity of the County is reflected. She would begin interviewing them, asking a set of simple questions. The goal would be to educate and then assess their knowledge and interest in the development of a ballot measure. She would ask each interviewee if they would consider being part of an informal sounding board committee that we could count on to check in with during the process. This would be the beginning of a database that we could build on and from which we could create a steering committee and eventually a campaign committee.

A simple, factual, educational tool would be created that briefly outlines the issue, highlighting how the need for services continues to grow, how funding is not growing at a necessary pace and asks the question...Is Sonoma County the kind of place that turns its back on its most vulnerable? The tool should be digital, in PowerPoint and in print to be used with identified individuals and group stakeholders throughout the County in whatever format is best to solicit input from them. Community members (and potentially health services staff) can be trained to help with this process.

Tasks involved with this project include:

- Interview DHS and CDC leaders
- Develop initial database of critical thinkers
- Develop interview questions
- Interview initial database
- *Initial polling (through EMC)*
- Develop basic educational tool (Defines issue, welcomes input)
- Train community/staff members to use tool
- Create initial website
- Use tool to educate, assess viability and develop support (website, social media, convened community groups)

SCI Consulting Group Approach

SCI will work in a data analysis support role to provide research for Task 1.3.2 Public Opinion Polling and Polling Analysis and Task 1.3.4 Feasibility Analysis of Ballot Measure Options and Expenditure Plan.

SCI has worked extensively with the parcel data throughout all of Sonoma County and has provided annual parcel assessment administration services to Marin-Sonoma Mosquito and Vector Control District since 2000. As a result, SCI maintains an extremely accurate database of Sonoma County parcels, including some attributes not maintained by the County Assessor.

SCI will use our proprietary database, and our experience working with Sonoma County parcel data to research, analysis and report on different revenue options, scenarios and methodologies, and make recommendations that optimize revenue while ensuring fairness, equity and efficiency.

Draft Initial Timeline

We will work with the County to develop an updated and detailed timeline that meets the project's needs. As a note, we don't anticipate using any specialized software during the course of this process.

January – March 2019

- Meet with staff from Department of Health Services, Community Development Commission and other County agency leadership to understand needs and vision
- Work with DHS and CDC leadership to develop outreach plan
- Identify and develop list of stakeholders and critical thinkers, including community partners, community leaders and County staff
- Meet with stakeholders and critical thinkers to educate, understand their knowledge and seek input on needs and potential measure

April – May 2019

- Develop initial questionnaire for poll—including potential projects to be funded, informational statements, tax rates, etc.
- Review questionnaire with working group committee
- Place poll in field
- Review and analyze results

June – July 2019

- Assess feasibility of measure
 - Identify programs and services voters are most likely to support
 - Determine whether the measure could reach necessary support threshold
 - Determine optimum election timing
 - Identify competing issues or controversies that must be considered before moving forward
 - Assess community awareness of your needs and determine the extent of proactive outreach that will be necessary
- Develop updated outreach plan to inform and engage influential external groups including elected officials, business leaders, neighborhood leaders, faith community leaders, taxpayer groups, and others, based on survey results
- Develop messaging materials, including community PowerPoint presentation, handout and FAQs to help with community outreach
- Develop online, social media and email blast content to communicate to internal groups and the community
- Update partners on poll results and plans for moving forward

August - December 2019

- Continue to meet with internal stakeholders and community organizations to provide information on needs and seek feedback
- Provide an update to internal and external audiences through existing communication channels, including website, social media, emails, newsletters and meetings
- Upon request - Write, design and produce mailing to educate, inform and engage voters

January – February 2020

- Review feedback from stakeholders, community leaders, County staff and voters
- Refine projects or plan based on feedback
- Work with County Counsel to develop all resolutions required for calling the election
- Develop the critical 75 word ballot question that will appear on the ballot

March – April 2020

- If needed – Conduct Tracking survey to test current support for ballot measure and make any tweaks to measure
- Present recommendation on final ballot language, measure and election timing to the County for formal approval

May - June 2020

- Board vote to place measure on the ballot
- Update all materials and messaging to reflect final ballot measure language
- Transition to independent advocacy campaign

TBWB Organizational Chart

Full Service and Support

TBWB provides extensive staff support, under close partner supervision, to your project. This helps to ensure a high level of quality control and work product that meets your needs and projects a high level of understanding and professionalism. We keep the largest full-time support staff of any firm in our industry, because effective strategic planning and implementation requires the attention and involvement of many professionals, including the lead partner.

We have an office full of experienced professionals – many of whom you'll never meet – but who will devote time and expertise to supporting your project. This includes our in-house graphic design and production department, and experienced research and campaign professionals.



Personnel

TBWB Strategies

Barry Barnes, Partner

Barry has overseen public policy and local ballot measure accounts for TBWB Strategies since 1996. In that time, the firm has passed more than 430 public funding campaigns, resulting in over \$20 Billion in voter-approved funding for schools, colleges, libraries, public safety, parks/open space, and transportation improvements in California, Oregon, Montana, Colorado, Maine, and Indiana.

Barnes has served as lead consultant on many of the firm's countywide campaigns, (all requiring 66%+ for passage). This included Regional Measure 3 (2018), Measure AA for bay restoration (2016) and the Santa Clara County transportation sales tax campaigns in 2008 and 2016. Other recent wins include the 2010 Marin County Libraries parcel tax, the 2006 renewal of the Sonoma County Open Space sales tax, the 2004 passage of Sonoma County's Measure M sales tax and the 2000 countywide tax victory for the Santa Clara Valley Water District.

Prior to joining the firm in 1995, Barry managed school bond efforts and other local campaigns throughout Northern California. He also served as a legislative director at San Jose City Hall for over three years, giving him personal experience with the fiscal challenges facing city officials.

Barry was born and raised in Mt. Shasta, California and received his B.A. from California State University, Chico in 1991. He lives in the East Bay with his wife Samantha and sons Abraham and Benjamin.

Sabrina Kochprapha, Senior Consultant

Since 2005, Sabrina has helped dozens of school districts, cities, healthcare districts and park districts develop local bond and tax measures for the ballot. Sabrina successfully helps public agencies throughout California communicate their needs to voters and build awareness about revenue measures. Once a measure has been placed on the ballot, Sabrina helps guide committees to implement winning campaigns.

Sabrina's clients comment on her strong organizational skills, ability to manage tight timelines, attention to detail and calm demeanor amidst the tremendous pressures of political campaigns.

Sabrina earned Honors in Political Studies at Pitzer College in Claremont, California, where she was also captain of her rugby team. In her free time she enjoys hiking, traveling and backpacking. She resides in Oakland with her husband, Kevin, and son, Corbin.

Mary Richardson, Senior Associate

Born in Massachusetts, Mary grew up in the small town of Marblehead. She first became involved with political campaigns during her senior year of high school when she volunteered on the victorious 2012 campaign for Senator Elizabeth Warren. She was drawn to the fast-paced campaign environment and went on to study Urban and Environmental Policy at Occidental College in Los Angeles with the hopes of more political work in the future.

While in school, Mary interned with the Los Angeles Unified School District in the Sustainability Initiatives Department, helping with outreach campaigns and communications materials. She also interned with the Service Employees International Union during the 2014 midterm elections, working with labor leaders and union members to elect progressive Los Angeles candidates.

After graduating college Mary worked with Tell That Story Creative Campaigning as a campaign organizer on City Council and School Board races in Los Angeles. Mary joined TBWB in 2018 and enjoys the opportunity to work with school districts, cities, counties and others to run effective, meaningful campaigns. Mary currently lives in Oakland and in her free time likes to hang out at Lake Merritt, go for a hike and swim in the ocean.

EMC Research

Ruth Bernstein, President and CEO

Ruth is recognized as one of the top pollsters in the field for her ability to keep the research focused on her clients' goals. She takes the time to understand the overall objectives and provide hands-on practical advice in addition to quality research. Her clients trust her judgment and know her research findings are reliable and will provide a strategic roadmap for success. With almost three decades in the political arena, Ruth understands the strategic challenges of partisan battles, top two primaries, instant run-off voting, supermajority vote thresholds and more. She is especially proud her work helping to elect women and people of color to elected office and securing voter approval for education, transportation, minimum wage increases and environmental protection.

Ruth also leads social marketing, policy, and brand awareness studies with government agencies, nonprofit and Fortune 500 companies. She has provided research-based, actionable guidance in a wide variety of topic areas including water conservation, travel and tourism, access to health care for the underserved, housing, energy, parks and open space and employee rights.

Ruth expanded her responsibilities and reach at EMC in 2018 when she took over as President and CEO.

Ruth came to EMC with hands-on campaign and nonprofit experience, and a BA degree in Economics from Smith College. She lives in San Francisco where she hikes, practices yoga, plans

travel adventures for friends and family, passionately roots for the Giants and seeks out midcentury chairs as she studies to become an upholstering pollster.

Related projects:

- Sonoma County Community Development Commission (Homes for All Survey, 2016)
- CA Proposition 1 (Statewide Affordable Housing Bond, November 2018)
- CA Proposition 2 (Statewide Mental Health Services Bond, November 2018)
- City of Berkeley (Measures O & P, Affordable Housing Bond and Transfer Tax, November 2018)
- Santa Rosa Measure N Campaign (Affordable Housing Bond, November 2018)
- Santa Clara County (Measure A: \$950M Affordable Housing Bond, November 2016)
- San Francisco (Measure A: \$310M Affordable Housing Bond, November 2015)
- Alameda County (Measure A1: \$580M Affordable Housing Bond, November 2016)
- City of Oakland (Measure KK: \$600M Infrastructure Bond, November 2016)
- Bay Area Council (Annual Bay Area Council Poll)
- San Francisco Bay Area Planning and Urban Research Association (SPUR)
- Nonprofit Housing Association of Northern California
- San Francisco Foundation
- Tipping Point

Jessica Polsky, Senior Vice President, EMC Research

Jessica brings her high standards for accuracy and attention to detail to every project she manages for EMC clients.

From her study of social psychology, Jessica uses her knowledge of psychological influences on decision-making to provide an understanding of underlying motivations. Her expertise informs her research design and allows her analysis to look beyond the obvious to uncover unique recommendations and strategies.

Jessica truly enjoys finding solutions to client problems and helping them succeed in implementing improvements that impact everyday lives. Her clients include many public agencies, and her research has resulted in billions of dollars in revenue for local schools, parks and open space districts, successful campaigns to expand water conservation and improved access to health care for the underserved.

Prior to joining EMC research in 2007, Jessica pursued contemporary jazz dance and was a law clerk at a disability rights law firm. Jessica still loves jazz music and dance and along with her husband, enjoys cooking, hiking, and window shopping along the Bay Area's many commercial corridors. Her spare time is consumed with her young family.

Jessica has a BA in Psychology from the University of Michigan and MA in Social Psychology from San Francisco State University.

Related Projects:

- City of Berkeley (Measures O & P, Affordable Housing Bond and Transfer Tax, November 2018)
- Santa Rosa Measure N Campaign (Affordable Housing Bond, November 2018)
- Bay Area Council (Annual Bay Area Council Poll)
- Nonprofit Housing Association of Northern California
- San Francisco Foundation

Andie Morhous – Senior Research Analyst

Andie is a Senior Research Analyst at EMC Research. She leads our work with public agencies in California and, as native of the East Bay, is invested in exploring the attitudes, opinions, and priorities of Northern California residents.

Before joining EMC in 2016, Andie worked as a political strategy and communications consultant specializing in public finance ballot measures supporting programs, services, and facilities throughout the state of California.

In her time at EMC Research, she has worked on both quantitative and qualitative research projects with diverse clients, including counties, cities, school districts, non-profits, candidates, and businesses. is particularly skilled with voter opinion research on environmental issues, education, housing, healthcare, and infrastructure.

Andie has a BA in Political Science from UC Berkeley.

Related Projects:

- Sonoma County Community Development Commission (Homes for All Survey, 2016)

Middlebrook Communications*Maureen Middlebrook, Consultant*

Maureen Middlebrook, Middlebrook Communications, has lived in Sonoma County since 1970 and knows her community well. Ms. Middlebrook was selected as a Community Member of the Press Democrat Editorial Board where she served for 18 months. This position, that rotates among community members, enhanced her knowledge of the media and exposed her on a weekly basis to discussions among the Board and community experts on significant community issues like the ones that are the topic of this RFP.

In most of her professional positions, Ms. Middlebrook acted as the liaison between the business and local elected officials. She understands local government and can facilitate communication among elected officials, government staff and community leaders. She was selected by the County Board of Supervisors to represent the County on the Golden Gate Bridge, Highway and Transportation District for sixteen years, serving as its President for two years.

Ms. Middlebrook holds a Bachelor of Arts in English from Holy Names University and a Master of Arts in Political Science from Sonoma State University. She has taught English as a Second Language at night for Santa Rosa Junior College for seventeen years. She knows well the challenges her students face daily, who are often in precarious financial positions that affect access to employment, housing and health care.

SCI Consulting Group

John Bliss, M.Eng., P.E., President and Senior Engineer, License No. C52091

John Bliss, a professional engineer and President of SCI, specializes in special tax consulting, assessment engineering, special and general benefit analysis, crafting legally compliant, robust Engineer's Reports, assessment administration, cost estimating and budgeting, database design and implementation, regulatory compliance, and revenue measure formations. He has 17 years of experience in this field of expertise. Mr. Bliss graduated from Brown University with a Bachelor of Science Degree in Engineering, and holds a Master's Degree in Civil Engineering from The University of California, Berkeley, where he was a Regent's Scholar. He is a licensed professional Civil Engineer in the State of California and is a LEED accredited professional.

Blair Aas, Director of Planning Services

Blair Aas specializes in the areas of developer mitigation, Mello-Roos formations, development impact fees and other new revenue mechanisms to offset the need for new or increased services and public facilities to serve new development. With over 17 years of experience in public finance and developer mitigation, Blair has developed extensive expertise in assisting public agencies in addressing all of the financial impact of new development. He has prepared over 100 impact fee programs and public facility financing plans. In this capacity, Blair has strong analytical experience in the inception of solid public facility planning and financial analyses. Blair graduated from Boise State University with a B.A. in Economics with an emphasis in public finance.

Maria Garcia-Adarve, Senior Consultant

Maria Garcia-Adarve specializes in and leads new local revenue measure balloting projects and opinion research for SCI. Since 2000, she has been partnering with her clients through all the phases of new revenue projects and works hard to enable them to expand their services. Whether they need a new public facility or secured jobs for vital public service providers, she is committed to helping people and communities. Maria often takes on challenging projects where she often develops good friendships with her clients. Her past experiences, in human resources and in the banking industry, enhance her ability to lead some of the largest projects for SCI. Maria graduated with honors from the University of Phoenix, with a Bachelor of Science degree in Business and Information Systems.

7.5 Cost

TBWB: Lead Consultants

TBWB's general consulting fee to serve in the roles described in this proposal would be \$7,500 a month from inception until placement of the measure on the ballot by the Board of Supervisors. In the event that the effort comes to an early end due to negative poll results or other challenges then TBWB's involvement and monthly fee could be terminated immediately.

This fee is based on the parameters provided within the RFP. However, should the scope of the project or the length of time be reduced, we would be willing to negotiate a reduced retainer.

EMC: Public Opinion Poll

The total cost to conduct a mixed-mode survey of 400 likely voters in Sonoma County, approximately 15 minutes average length, in English and Spanish is \$26,000.

In addition to all aspects of conducting the survey, the proposed cost includes consulting on the application of results. This is our start to finish, all-inclusive cost for all services and deliverables outlined.

Maureen Middlebrook, Middlebrook Communications

Ms. Middlebrook charges \$165/hour. Our expectation is that she would work between 20 and 40 hours a month depending on the phasing and the needs of the project.

SCI Consulting Group

SCI Consulting Group charges an hourly rate ranging from \$65 - \$245 and is willing to commit to a budget, based on hourly actual work performed, that would not exceed \$7,500.

Reimbursement of Expenses

In addition, the reimbursement of expenses incurred from time to time in connection with the performance of our services may include automobile mileage at the established IRS reimbursement rate at the time of travel, parking fees, copying fees, or postage, etc.

Based on the current scope of services, we don't foresee any additional expenses, costs or fees to complete the requirements of this project.

7.6 Identification of Subcontractors

TBWB Strategies will enter in a contract with the County and will subcontract with EMC Research to conduct polling, SCI Consulting Group to provide research and analysis for ballot measure and expenditure plan options, and Maureen Middlebrook to assist with stakeholder outreach. Refer to section 7.2 for an overview of scope of work for each subcontractor.

EMC Research uses trusted subcontractors for translation services and to perform telephone surveying data collection. Our Field Department, helmed by Vice President and Field Director Shani McElroy, is solely focused on high-quality, error-free data collection and adherence to project plans and budgets. Her department maintains long-term relationships with a carefully-vetted short list of vendors and carefully supervises their work; we only work with vendors who have demonstrated a commitment to quality over the years.

7.7 Contract Terms

TBWB Strategies is willing to accept the Sample Agreement terms.

7.8 Insurance

TBWB is willing to submit and comply with all insurance requirements.

For your reference, TBWB Strategies is insured by MOC Insurance Services and Paychex Insurance Agency, Inc. Please see the following table for specifics regarding TBWB's coverage.

Insurer	Type of Insurance	Limits	
MOC Insurance Services	Commercial General Liability	Each concurrence	\$1,000,000
		Damage to rented premises (each occurrence)	\$300,000
		Medical expenses (any one person)	\$10,000
		Personal & adv injury	\$1,000,000
		General aggregate	\$2,000,000
		Products – comp/op aggregate	\$2,000,000
	Automobile Liability (Hired autos & non-owned autos)	Combined single limit (Each accident)	\$1,000,000
	Umbrella Liability & Occur	Each occurrence	\$1,000,000
		Aggregate	\$1,000,000
	Errors & Omissions	Aggregate limit	\$1,000,000
		Retention	\$15,000
Paychex Insurance Agency, Inc.	Worker's Compensation Coverages	Disease (policy limit)	\$1,000,000
		Disease (each employee)	\$1,000,000
		Each accident	\$1,000,000

7.9 Additional Information

Case Study: SF Bay Restoration Authority, Measure AA 2016

Established by the California State Legislature in 2008, the San Francisco Bay Restoration Authority is a unique nine-county agency tasked with restoring and protecting wetlands that surround the San Francisco Bay. Over the past 150 years, development, diking, and filling dramatically reduced the Bay Area's 200,000 acres of wetlands to just 40,000. In 1999, scientists determined that the Bay needs 100,000 acres of re-established tidal marsh to be healthy and sustainable. Despite over 30,000 acres of wetlands in public possession awaiting restoration, funding remained the missing ingredient.

The San Francisco Bay Restoration Authority explored options to provide the stable, local funding needed to restore the Bay for future generations, protect habitat for fish, birds and wildlife, and enhance shoreline recreational access.

For nearly ten years, EMC Research was involved in the effort to secure funding for Bay restoration. EMC's initial survey of Bay Area residents conducted for Save the Bay in 2006 was used to show opinion leaders that voters were willing to support funding and helped lead to the creation of the San Francisco Bay Restoration Authority.

EMC conducted focus groups in 2011 for the Restoration Authority to understand voter perceptions of the Bay and gain an in-depth understanding of how to talk about the measure and the projects it would fund. That information helped refine the ballot question and identify key messages. An extensive phone survey in 2011 looked carefully at geographic differences in support and provided a strategic roadmap for next steps. Additional surveys in 2013 (funded by Save the Bay) and 2014 were used to aid strategic decisions around the timing, duration, and tax amount for a Bay restoration measure.

The Authority made the decision to go on the June 2016 ballot after a December 2015 telephone survey of nine-county Bay Area voters showed that support for a parcel tax was close to the two thirds necessary for passage. EMC conducted a web survey among Save the Bay stakeholders in March 2016, which measured stakeholder views on the parcel tax measure and messaging materials as well as attitudes towards other Save the Bay programs and the organization itself. In April 2016, EMC conducted focus groups to gauge reactions to campaign messaging and media. All of the research and additional focus groups conducted on behalf of the campaign helped ensure victory; Bay Area voters approved Measure AA in June 2016, providing an estimated \$500 million of funding for Bay restoration over twenty years.

The measure presented an unprecedented challenge of communicating with almost 3.7 million registered voters in a broad geographic region ranging from dense, urban neighborhoods to rural, agricultural areas—a larger district than many Congressional districts. With a smaller projected turnout than a general election, the June 2016 primary election offered an

opportunity for the campaign to maximize resources available for communication and avoid getting lost on the crowded ballot expected for November.

As general consultants to the campaign, TBWB devised an ambitious and innovative strategy to communicate with likely voters and mobilize likely supportive voters, leading a campaign team that included specialists in research, fundraising, television, digital and field. The campaign employed unique, eye-catching TV advertisements that drew upon the Bay's natural beauty to persuade likely voters to support the measure. An innovative, targeted digital outreach effort employed cutting-edge technology to serve online advertising directly to voters likely to support environmental issues. Finally, two direct mail pieces ensured that vote-by-mail voters received messaging from the campaign while their ballots were in hand.

Measure AA brought together a broad coalition of environmental, business and labor organizations. With TBWB's leadership and guidance in messaging, the campaign coalition was able to garner over 2,000 endorsements. A full staff of county field organizers mobilized grassroots stakeholders in support of the measure.

On Election Day, Measure AA passed with over 70% support—representing over 1 million votes in favor of the measure—across nine counties.

Case Study: LA County, Measure H 2017

In January 2017, TBWB was hired to help LA County develop and implement a rapid public information and outreach program for Measure H, which had already been placed on the March 2017 municipal election ballot.

TBWB developed informational materials including television and online video ads, one-page handouts and inserts, presentation and meeting materials and other message-based collateral as-needed.

TBWB also helped coordinate and lead a table of county officials, including representatives from Countywide Communications, LA County Homeless Initiative, and Supervisor's office, to identify communication opportunities and priorities, develop messaging and materials and meet key deadlines.

We oversaw a countywide issues survey that helped clarify themes related to public understanding of the policy issues around homelessness. Polling showed members of the public had a very low awareness of the County's Action Plan to fight homelessness.

We helped county officials identify their most-effective existing stories and materials and advised regarding county communications and content. We worked with county officials to take advantage of existing communication channels when possible. All message and materials were cleared by County Counsel prior to being finalized.

In March 2017, despite a low turnout election (14% countywide) and initial low awareness of the County's Action Plan regarding homelessness, Measure H achieved the needed 2/3 for victory.

Attached Samples from Previous Campaigns

- City of Emeryville: Measure C, June 2018
 - Direct Mail
 - “Afford”
 - “Notice”
- Los Angeles County: Measure H, March 2017
 - Banner Graphics
 - Mailer Insert
 - Infographic
 - Bilingual One Pager