



GODBE RESEARCH
Gain Insight

PROPOSAL TO CONDUCT VOTER
OPINION SURVEY RESEARCH AND
POLLING SERVICES

Presented to the City of Santa Barbara

March 20, 2013

Firm Background and 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 and voter polling agency with offices in San Mateo (San Francisco/Northern California), Newport Beach (Southern California/Southwest), and Bellevue (Seattle/Northwest) housing 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 sector clients throughout California and 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.

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 more than 250 successful California local government revenue measures, including sales taxes, utility users taxes (UUT), transient occupancy taxes (TOT), parcel taxes, business license taxes (BLT), general obligation bonds, and other funding mechanisms in general, special, and all mail ballot election cycles. Some of our most recent polling experience includes projects leading to electoral success for the Cities/Towns of Artesia (2012 BLT), Albany (2012 sales tax), Ridgecrest (2012 sales tax), Santa Maria (2012 sales tax), Fairfield (2012 sales tax), Moraga (2012 sales tax), La Mirada (2012 sales tax), City of Salinas (2012 sales tax), Mammoth Lakes (2010 UUT), Concord (2010 sales tax), Placerville (2010 sales tax), Novato (2010 sales tax), Tracy (2010 sales tax), El Cerrito (2010 and 2008 sales taxes), San Rafael (2010 parcel tax and 2005 sales tax), San Leandro (2010 sales tax), Davis (2010 sales tax), Union City (2010 UUT), Atherton (2009 parcel tax), Cupertino (2009 UUT), Hayward (2009 UUT), Banning (2009 TOT), Palmdale (2009 TOT), Covina (2008 UUT), and others since the economic downturn of mid to late-2008 alone. In addition, we were the pollster for the 2012 and 2008 Santa Barbara Unified School District parcel taxes and 2010 general obligation bond measures.

The research that the Godbe Research team performs represents a vital tool for improving the success rate of revenue measures and in helping to align agency needs with voter expectations. Through our voter polling, we can: evaluate community expectations for levels of service for publically provided services; rank the importance of publically provided services from a variety of agencies; determine or confirm the appropriate funding mechanism based on voter tolerance; evaluate baseline and informed support for a revenue measure or measures; determine and rank the specific projects and programs that voters are most interested in funding with a given measure; identify the arguments and features of a measure that increase/decrease support for the measure(s); help to inform the strategy of a public information campaign and the substantive content of the campaign; evaluate or confirm 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. This process has led to a success rate of just over 90% for all revenue measures that Godbe Research has been involved with; moreover, this success rate is for the 20+ years we have been in business – in good economic times and bad.

Project Understanding and Research Objectives

Godbe Research is a recognized leader in voter opinion research for California local government agencies. Given our more than 23 experience with municipal revenue measures, we understand that each project's success depends on recognizing the individual and unique polling needs of each client and then developing a customized polling project to address these needs. To this end, Godbe Research has crafted the following general project work plan for the City of Santa Barbara (Santa Barbara or City) to illustrate the types of considerations that go into each of our voter opinion research projects, with a recommended telephone survey methodology.

Based on a preliminary review of the City's request for proposal (RFP), Godbe Research understands that there are several important research objectives to be addressed by the voter opinion research, the most important of which include: 1) determining and ranking local issues of importance to Santa Barbara voters; 2) assessing spending priorities of voters in the City vis-à-vis the range of publically provided services in the community; 3) determining baseline and informed support for a potential revenue measure or measures in the City to fund public services, address infrastructure needs, and restore funding taken away with the dissolution of RDA's; 4) identifying the maximum tax threshold supported by the necessary percentage of Santa Barbara voters for the measure or measures being tested; 5) evaluating and ranking the specific projects and programs that a potential measure could fund to address the City's needs as a general or special tax; 6) examining the impact of various statements on voter support for potential revenue measures (arguments 'for' and 'against' the measures), including duration of the measure(s); 7) evaluating a variety of special and general election cycles for the measures under consideration and recommending an election cycle in which the measure would have its best chance of success; 8) packaging the most viable measure so that the necessary percentage of City voters would support that measure; 9) collecting demographic information on voters in Santa Barbara not already contained in the voter file for profiling and segmentation purposes, *and*; 10) additional objectives to be refined between Godbe Research and the City of Santa Barbara.

Proposed Scope of Work for the Voter Polling

Below, Godbe Research has a general scope outline for the City to illustrate the types of considerations that go into each of our voter opinion research studies. While each of our polling projects is customized to the needs of our clients, there is a proven process to conducting voter opinion research to address revenue measure feasibility and community priorities, which has been outlined below.

- Conducting an in-person project kick-off meeting with the City as well as additional meetings and conference calls, as needed.
- Reviewing City voter and resident demographics, polling and results on past ballot/revenue measures (both for the City and other agencies that also serve the City).
- Developing a stratified and clustered sample of Santa Barbara voters likely to vote in the 2013 and 2014 election cycles of interest. For reference, we have identified that there are a total of 47,301 voters in the City, of which 19,459, 24,237, and 31,823 are likely to cast ballots in the November 2013, June 2014, and November 2014 cycles, respectively. June 2014 is tricky, however, given that Governor Brown could or could not run again.
- Designing and refining a survey instrument of between 15 and 18-minutes in length so that it addresses all of the research objectives of Santa Barbara for the revenue measure voter polling. While each of our revenue measure surveys is customized to a given client; our survey design follows a specific and proven format. Accordingly, the survey will address topics such as: issues of importance to the community; a ranking of City provided services; a first unaided ballot test for the revenue measure; tax threshold test using a reverse auction method; projects/programs to be funded or maintained by the measure; arguments 'for' and 'against' the revenue measure; duration of the measure and any special features; a second ballot test after relevant information has been presented, and finally; demographic questions for those not included in the voter file. Please note we do not recommend any A/B measure process, as the advisory measure will pass while the funding measure will ultimately fail.
- Pre-testing and CATI programming the survey instrument to ensure accurate and efficient data collection. Interviews are conducted by a live, trained interviewer in the western U.S.
- Optionally translating the survey into Spanish for monolingual Spanish-speaking voters or bilingual voters who would prefer to respond in Spanish, and Spanish language interviewing for up to 5% of all interviews, per the State voter file. For reference, we did not translate any of the Santa Barbara Unified School District voter polls.

- Conducting approximate 15 to 18-minute telephone interviews with 400 (n=400) to 600 (n=600) total City voters according to a strict interviewing protocol and our approved sampling design. Within this design, we can split the sample into 2 to 3 subgroups of 200 interviews to be able to test up to three unique measures (e.g. sales tax, bond, etc.). Splitting of the sample is highly recommended in order to avoid voter confusion that more than one measure could be on the ballot, based on more than 25 similar assignments.
- Processing and weighting the data to adjust for population distribution, as needed, and meeting with Santa Barbara to review topline/aggregate survey results.
- Analyzing the survey results and preparing a comprehensive report of findings conclusions, and recommendations for Santa Barbara, which directly addresses the research objectives outlined for the voter study. We also provide several unique value added modules including:
 - ❖ Feasibility Analysis: We will advise the City if a sales tax or any revenue measure is possible, based on our polling results, or if a longer public education and outreach process is necessary prior to placing any measure on the ballot. We will also advise if a specific tax or general tax is most palatable to voters, and how that would impact election timing, tax rate, and duration.
 - ❖ Ballot Question Wording: We will work with the City to develop and refine a ballot question that reflects the benefit ranking results from the survey for the selected measure. Furthermore, we will work with the City to refine that language until it meets the approval of all key parties (e.g. County Registrar, City Attorney, etc.), should the City elect to pursue a revenue measure based on polling results.
 - ❖ Tax Threshold Report: In almost all cases, support for a measure depends on how much a measure will cost. Godbe Research's tax threshold report looks at how various tax levels will affect the City's chance of passing each tax measure in order to maximize the revenue amount to meet the City's needs. We will also look at duration, which has an inverse relationship to tax amount.
 - ❖ Election Timing Report: The election timing report section will describe the factors associated with the election cycles of interest and opportunity, integrate these factors with survey findings, and determine if there are any potential problems with a specific cycle under consideration.
 - ❖ Profile of Voters: Godbe Research has created a proprietary model used to create a profile of voters' "Strong support," "Potential support," and "Strong opposition" for public education and outreach purposes.
- Presenting the survey results and recommendations from the survey to the City and providing post-survey consulting with Santa Barbara (and any other internal/external project stakeholders or consultants) on the survey results and recommendations from the survey throughout the revenue measure process and up to Election Day (no charge).

Project Time Line Discussion

Because of our extensive experience in conducting voter polling for a variety of public sector agencies, Godbe Research can generally conduct a voter opinion research project in about four to six weeks; however, we can speed up the process, as needed. Given the five page limit for the proposal process, we do not have room to provide a formal time line of all activities, however, we can commit to the City's schedule of beginning the project on April 9, 2013 and completing the project by May 3, 2013, including presenting results to Council on May 7, 2013. We can also commit the other dates in the City's RFP for the draft survey instrument, polling plan, etc. A formal time line, with calendar dates for meetings and deliverables will be provided to the City shortly after the project kick-off meeting, where we can discuss schedules and deadlines.

Proposed Project Costs

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 projects. Based on our basic understanding of needs of the City of Santa Barbara, we have provided cost options below as a total line item for a 15 to 18-minute survey of 400 (n=400) to 600 (n=600) total voters, with optional costs to include a Spanish-language component. The prices below would reflect the all inclusive costs to complete the revenue measure feasibility survey project for the City, including two trips to the City as part of the project. Finally, we can provide costs broken down by specific task, as requested. The line item costs correspond to the five-page proposal limit.

15 to 18-Minute English Only Survey of 400 (n=400) Voters:	\$21,700 to \$23,320
Cost to Include Spanish Translation & Interviewing (5% of interviews)	\$975 to \$1,325

15 to 18-Minute English Only Survey of 600 (n=600) Voters:	\$26,350 to \$28,690
Cost to Include Spanish Translation & Interviewing (5% of interviews)	\$975 to \$1,325

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. Accordingly, the team at Godbe Research is comprised of recognized experts in survey research design and implementation, and for this project for Santa Barbara we will assign our most experienced project manager, Bryan Godbe (President and Principal Researcher). Bryan has designed and conducted over 200 survey research projects in the past three years alone, including projects for each of the client references listed later in this proposal. 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 contact for City staff and administration. A brief biography 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 (since 2010) successful sales tax and other revenue measure efforts for the Cities of Santa Maria, Ridgecrest, Fairfield, Concord, Tracy, Salinas, La Mirada, Moraga, Oakdale, Placerville, and Novato, as well as the Counties of Stanislaus, San Mateo, Marin, and Sonoma. He was also the pollster for the 2012 and 2008 successful parcel taxes for the Santa Barbara Unified School District, as well as their successful 2010 bonds.

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.

Godbe Research Client References

Below are several relevant client references that demonstrate our experience with projects for clients with similar needs, including testing more than one potential measure. Please let us know if you would like us to facilitate contact with any of our references, given the expedited timing for the process.

City of Santa Maria

Projects: 2012 Sales Tax Measure Feasibility Survey
Contact: Rick Haydon, Assistant City Manager / 805.925.0951 ext. 423
Notes: Sales tax measure passed in June 2012.

City of Ridgecrest

Project: 2012 Revenue Measure Feasibility Survey of Voters
Contact: Kurt Wilson, City Manager / 760-499-5004
Notes: Sales tax measure passed in June 2012.

City of La Mirada

Projects: 2012 Sales Tax Measure Tracking Survey
2011 Revenue Measure Feasibility Survey (sales tax and UUT)
2006 and 2008 Resident/Voter Satisfaction Surveys
2006 and 2008 Employee Satisfaction Surveys
Contact: Tom Robinson, City Manager / 562-943-0131
Notes: Sales tax passed in November 2012 with a TOT measure passing in 2009.

City of Salinas

Project: 2012 Revenue Measure Feasibility Survey of Voters
Contact: Matt Pressey, Finance Director / 831-758-7420
Notes: Sales tax measure passed in November 2012.

City of Tracy

Project: 2010 Revenue Measure Feasibility Survey of Voters
Contact: Maria Hurtado, Assistant City Manager / 209-831-6112
Notes: Sales tax measure passed in November 2010.

Town of Mammoth Lakes

Projects: Utility Users Tax Measure Feasibility Study 2010
Contact: Robert Clark, Town Manager / 760-934-8989 x226
Notes: Special (66/7%) UUT measure passed in the June 2010 election cycle.

City of El Cerrito

Projects: 2012 Bond Measure Feasibility Survey (current)
2010 Sales Tax Measure Feasibility Survey
2008 Streets/Roads Specific Sales Tax Tracking Survey
2004 UUT Measure Feasibility Study
Contact: Scott Hanin, City Manager / 510-215-4301
Notes: Sales tax measures passed in 2010 and 2008 (special). UUT passed in 2004.

Santa Barbara Unified School District

(Elementary and High School Districts Consolidated in 2011 under the Thompson Act)

Projects: 2012 Parcel Tax Measure Feasibility Survey of Voters
2010 Bond Measure Feasibility Poll of Voters
2008 Parcel Tax Measure Feasibility Poll of Voters
Contact: Dr. David Cash, Superintendent / 805-963-4338 ext. 6201
Notes: Parcel taxes passed in 2012 and 2008. Bond measures passed in 2011 in the former Elementary and High School Districts.



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