

RESOLUTION NO. 2022-61

RESOLUTION OF THE CITY COUNCIL OF THE CITY OF MARINA
APPROVING AGREEMENT BETWEEN CITY OF MARINA AND FAIRBANK, MASLIN,
MAULIN, METZ & ASSOCIATES (FM3) FOR PUBLIC OPINION RESEARCH SERVICES

WHEREAS, the City Council is currently considering the possibility of placing a General Obligation Bond tax measure on the November 2022 ballot; this action will require voter approval and is likely to be of intense interest to the City's residents and businesses, and;

WHEREAS, California local governments commonly engage outside consultants to assist them in (i) developing ballot measures that will meet community needs, (ii) seeking community input into proposed measures, and (iii) responding to the community's need for factual, public information regarding proposed measures, and;

WHEREAS, while the City Council held multiple public meetings in 2021 and January and April 2022 to start the discussion process and begin to get community input and feedback, and;

WHEREAS, Fairbank, Maslin, Maullin, Metz & Associates (FM3) has conducted community research for over 146 California cities(including the City of Marina) dealing with issues such as public safety, libraries, parks, infrastructure, health care, open space, social services, and transportation.

NOW THEREFORE BE IT RESOLVED that the City Council of the City of Marina do hereby:

1. Approve agreement between the City of Marina and Fairbank, Maslin, Maullin, Metz & Associates (FM3) for public opinion research services (**EXHIBIT "A"**) in an amount not to exceed \$29,750, plus incidentals and
2. Authorize subsequent minor changes if necessary with City Attorney approval, and;
3. Authorize City Manager to execute agreement amendment on behalf of City subject to final review and approval by the City Attorney, and;
4. Authorize the Finance Director to make the necessary accounting and budgetary entries.

PASSED AND ADOPTED by the City Council of the City of Marina at a regular meeting duly held on the 17th day of May 202 by the following vote:

AYES: COUNCIL MEMBERS: Medina Dirksen, Burnett, Biala, Delgado

NOES: COUNCILMEMBERS: None

ABSTAIN: COUNCILMEMBERS: None

ABSENT: COUNCILMEMBERS: Berkley

Bruce C. Delgado, Mayor

ATTEST:

Anita Sharp, Deputy City Clerk

Proposal to Conduct Ballot Measure Viability Research for the City of Marina

Submitted by FM3 Research



Contact:
John Fairbank
Partner



OPINION
RESEARCH
& STRATEGY

May 2, 2022

Layne Long
City Manager
City of Marina

Dear City Manager Long,

Fairbank, Maslin, Maullin, Metz & Associates (FM3 Research or FM3) is pleased to present this proposal to provide public opinion research services for the City of Marina related to a potential November 2022 infrastructure bond ballot measure. We would be thrilled to work with you and your team again, and we believe FM3 is the clear choice to provide the research services the City of Marina requires for reasons detailed throughout the forthcoming proposal. These include:

- **FM3's research is demonstrably effective in helping the City of Marina achieve your revenue measure-related goals.** As you know, our July 2016 survey research for the City informed your successful efforts to both select a viable revenue measure for that November's ballot and communicate effectively with your residents and stakeholders about why the measure was necessary and what it would accomplish. Measure U, the City's business license tax, was ultimately approved with more than 82% support.
- **FM3 is a leader in conducting research throughout your region.** Our work has contributed to the success of 18 local finance measures throughout Monterey County for clients including the cities of Monterey, Seaside, Pacific Grove and Salinas (among others), in addition to the City of Marina itself. We also regularly conduct research for local elected officials, such as Congressman Jimmy Panetta and former Supervisor Jane Parker, as well as on behalf of a range of civic and community groups and environmental organizations. As a result of this experience, our team is extremely familiar with not just the issues, but the cycles and rhythms of local public opinion and its evolution over time.
- **FM3's team are experts at conducting research for successful local tax and bond ballot measures in California.** Our research has contributed to voter approval of 607 local finance measures for California agencies (including 53 on the November 2020 ballot alone), with a success rate greater than 95 percent.
- **FM3 provides personalized service from company partners and senior personnel.** FM3 Partner John Fairbank and Vice Presidents Miranda Everitt and Adam Sonenshein will collaborate to design, draft, analyze, interpret, and present every aspect of your research and its findings and will remain available to provide ongoing consultation on the project for as long as needed.

As an FM3 Partner, I am authorized to contractually obligate and negotiate on behalf of our firm. If FM3 is fortunate enough to be selected for this project, I will be delighted to once again serve as Project Manager for the research we conduct for your City.

The FM3 team would be very pleased to work with the City of Marina to help ensure the success of this important project. If you have any questions regarding this proposal or would like any additional information, please do not hesitate to contact us directly. We appreciate your time evaluating our submission, and we thank you very much for your consideration.

Sincerely,



John Fairbank, Partner
Fairbank, Maslin, Maullin, Metz & Associates (FM3)
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Los Angeles, CA 90025
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1 FM3 COMPANY PROFILE

Fairbank, Maslin, Maullin, Metz & Associates (FM3 Research or FM3) is a California-based company with 22 full-time employees located in our Los Angeles and Oakland offices. We have been conducting public policy-oriented opinion research since 1981 on issues of major economic and social concern, such as budgetary issues and taxation; constituent satisfaction with public services and support for policy proposals; public safety; education; transportation; health care; growth and property development; environmental protection; natural resource conservation and development; communications technology; energy development; and organizational branding.

In any given year, FM3 conducts hundreds of surveys and focus groups (as well as other types of opinion research), which we use to provide strategic insights and advice to our clients. All key FM3 staff members have advanced degrees in public policy, research methods, and/or extensive experience working in state and local government, and every FM3 project is personally led by one of our firm's Partners, each of whom is a nationally respected authority on public opinion research in their own right.

Additionally, while our firm is not so big that you will wonder whom to call with your questions, we are big enough to have our own in-house data analysis/processing team and graphic design resources. This means we can provide our clients with a level of personal attention and service from firm Partners and other senior staff more often associated with much smaller organizations, while also providing rapid project turnaround and more sophisticated data analysis and presentations tailored to client needs, as one might expect from larger firms.

Furthermore, FM3 utilizes a variety of research tools designed to address each client's unique circumstances. Some of these tools are quantitative, such as surveys; some are qualitative, such as focus groups; and others fall somewhere in between. Additionally, we continue to utilize and experiment with newly evolving online and digital research approaches. Part of this involves FM3 actively monitoring methodological developments through our industry's trade association – the American Association for Public Opinion Research (AAPOR) – in order to provide our clients with the best tools to meet their research needs.

FM3 stays well informed on the latest issues facing local governments through its work as the public opinion research firm for the League of California Cities. FM3 has served as the League's primary pollster for many years, and our research has contributed to numerous victories for the League and its member agencies, both in the legislature and on the statewide ballot. In this capacity, we regularly conduct research at the statewide level as well as in dozens of local communities throughout California. Most recently, FM3 worked closely with the League to help preserve local authority over land-use and housing issues from encroachment by Sacramento and to shore up support for former Governor Brown's transportation funding package, Senate Bill 1. Our team also regularly conducts seminars and forums with the League to advise city leaders about how public opinion research can be used to address the concerns, needs and priorities of their residents, and to provide additional funds for city services.

The finance measure research that FM3 conducts for our public agency clients not only assists in drafting the most compelling 75-word ballot label possible, but also quantitatively identifies which unique, legally permissible messages will resonate most among that agency's constituents when engaging in community outreach and

education, thus providing a thematic and communications roadmap to securing the required level of support. The efficacy of this approach is demonstrated by our firm’s **success rate of over 95 percent** since its 1981 inception – with a total of **607 local finance measures approved for California agencies** (including 247 G.O. bonds, 185 sales taxes, 49 parcel taxes, 41 utility user taxes [UUTs], and 27 transient occupancy taxes [TOTs], among other finance measure mechanisms) in every region of the state, more than any other research firm. More detailed information about our company, services, and clients may be found on our website, www.fm3research.com.

2 RELEVANT EXPERIENCE

2.1 Experience in Marina & Monterey County

FM3 is extremely active throughout Monterey County and its constituent communities. In addition to our work with the **City of Marina** on your successful business license tax (**Measure U**) in 2016, FM3’s research was recently utilized by the **City of Monterey** to inform a successful ½-cent sales tax (**Measure G**) approved by voters in March 2020. Earlier, FM3 helped the City of Monterey secure voter approval in November 2018 for **Measure S**, extending a 1-cent sales tax providing dedicated funding for the City’s street and infrastructure needs. Other recent successful finance measures for local agencies include the passage of both a ½-cent sales tax (**Measure L**) and a cannabis tax (**Measure G**) for the **City of Seaside** in June 2017, and a parcel tax (**Measure E**) for the **Monterey Peninsula Regional Park District** in 2016. In 2014, **FM3’s survey research for the City of Monterey helped the City secure voter approval for Measure P**, the four-year, 1-cent dedicated sales tax. Our earlier work aided in passing 1-cent sales tax measures for both the City of Seaside (**Measure R**) and the **City of Pacific Grove (Measure U)** in 2008, and we have evaluated public support for facilities bond measures for both the **Monterey Peninsula Unified School District** and the **Monterey Peninsula Community College District**.

Key Fact:
*FM3’s research has helped pass a total of
 18 local agency finance measures in
 Monterey County.*

Elsewhere in Monterey County, in November 2018, FM3 helped **South Monterey County Joint Union High School District** pass two bond measures on the same ballot: Measures Q and R. Each bond was for \$20 million, with one focused on facility updates and safety measures and the other on classroom upgrades. Additional research has included successful local finance measures for the **City of Salinas** (a sales tax, **Measure V**), the **Salinas Union High School District** (two separate school bonds, **Measure F & Measure M**), the **Spreckels Union School District** (a school bond, **Measure B**), the **Alisal Union School District** (a school bond, **Measure A**), the **Coalinga-Huron Joint Unified School District** (a school bond, **Measure E**) and the **Hartnell Community College District** (a community college facilities bond, **Measure H**).

In addition to the past work described above, our team is currently providing ongoing research for **First 5 Monterey County** as part of an effort to secure funding for early childhood services. A complete list of FM3’s successful finance measures for local agencies in Monterey County is provided by **Figure 1**.

Figure 1: FM3 Local Finance Measure Wins in Monterey County

Agency	Measure	Mechanism	Election
City of Monterey	Measure G	½ Cent Sales Tax	March 2020
City of Monterey	Measure S	1-Cent Sales Tax	November 2018
South Monterey County JUHSD	Measure Q	\$20 million Bond	November 2018
South Monterey County JUHSD	Measure R	\$20 million Bond	November 2018
City of Seaside	Measure L	½-Cent Sales Tax	June 2017
City of Seaside	Measure G	Cannabis Tax	June 2017
City of Marina	Measure U	Business License Tax	November 2016
Monterey Peninsula Regional Park District	Measure E	\$25.26 Parcel Tax	November 2016
City of Monterey	Measure P	1-Cent Sales Tax	November 2014
Spreckels Union School District	Measure B	\$7 Million Bond	November 2012
Coalinga-Huron Joint Unified School District	Measure E	\$16.1 Million Bond	November 2010
City of Pacific Grove	Measure U	1-Cent Sales Tax	June 2008
City of Seaside	Measure R	1-Cent Sales Tax	February 2008
Alisal Union School District	Measure A	\$90 Million Bond	November 2006
City of Salinas	Measure V	1/2-Cent Sales Tax	November 2005
Hartnell Community College District	Measure H	\$131 Million Bond	November 2002
Salinas Union High School District	Measure M	\$37 Million Bond	November 2002
Salinas Union High School District	Measure F	\$52 Million Bond	March 2002

Aside from local finance measures, we have conducted research for private clients such as the **Monterey Bay Aquarium** and **California American Water**, local environmental groups including **LandWatch Monterey County** and the **Santa Lucia Conservancy**. We currently serve as pollsters for U.S. Congressman **Jimmy Panetta**, and we have conducted research for other local elected officials and political candidates including former Monterey County Supervisor **Jane Parker**, former Supervisor **Simon Salinas**, former Congressman **Sam Farr**, former state legislators **Rusty Areias**, **Fred Keeley**, **Henry Mel**, and **Byron Sher**, and former Salinas Mayor **Dennis Donohue**. FM3 has also played a leading role for more than two decades conducting research on public perceptions of and support for the redevelopment of **Fort Ord**. As a result of this experience, **our team is extremely familiar with not just the issues, but the cycles and rhythms of local public opinion and its evolution over time.**

2.2 California Municipal Finance Ballot Measure Experience

FM3 is a recognized leader in conducting research that helps California cities objectively evaluate the viability of passing local ballot measures to secure additional revenue. Our research identifies the feasibility of a potential ballot measure (or measures); the most appropriate tax rate and revenue mechanism (g.o. bond, sales tax, transient occupancy tax, utility user tax, etc.); how voters would prefer additional revenue to be used; how to phrase the ballot label language, and provides a thematic and communications roadmap for securing the

necessary level of public support. Our municipal clients represent a diverse cross-section of large and small cities, including suburban, urban, and rural communities. Furthermore, we work with cities throughout the Central Coast, Southern California, the Central Valley, the Bay Area, and Northern California. We make it a priority to work closely with each city and local stakeholder to design the research because we know every community is different and requires an approach that addresses its own unique characteristics and needs.

Key Fact:

FM3's research has been used to pass local finance measures for 146 California cities since 2008, including 17 cities on the Central Coast.

In the most recent statewide election in November 2020, FM3's research helped 36 California cities including **Arcata, Bellflower, Carson, Commerce, Corona, Costa Mesa, Cotati, Daly City, Exeter, Half Moon Bay, Healdsburg, Imperial Beach, Lomita, Long Beach, Los Alamitos, Milpitas, Montclair, Morro Bay, Orinda, Oxnard, Palmdale, Pasadena, Paso Robles, Petaluma, Piedmont, Pismo Beach, Richmond, San Bernardino, San Francisco, San Jacinto, San José, San Luis Obispo, South El Monte, South Lake Tahoe, Turlock, and West Hollywood**, pass ballot measures to provide funding for local public services. (Central Coast cities are underlined)

The following 146 California cities have engaged FM3's research and consulting services since 2008 to successfully pass ballot measures to fund city services and programs (17 Central Coast cities are underlined): **Arcata, Alameda, Alhambra, Antioch, Arcadia, Arvin, Azusa, Bakersfield, Bellflower, Benicia, Berkeley, Burbank, Capitola, Carson, Carpinteria, Canyon Lake, Cathedral City, Chowchilla, Clearlake, Cloverdale, Coachella, Commerce, Corona, Costa Mesa, Cotati, Compton, Covina, Culver City, Daly City, Delano, Desert Hot Springs, Diamond Bar, Dinuba, Downey, Duarte, East Palo Alto, El Monte, Exeter, Fountain Valley, Galt, Gardena, Garden Grove, Gilroy, Glendale, Grover Beach, Half Moon Bay, Hawthorne, Healdsburg, Hemet, Hercules, Hollister, Huntington Beach, Imperial Beach, Indio, Inglewood, Kingsburg, La Puente, Lakeport, Lakewood, Laguna Beach, La Mesa, La Habra, Lathrop, Larkspur, La Quinta, Lawndale, Lomita, Long Beach, Los Alamitos, Los Angeles, Los Banos, Lynwood, Marina, Martinez, Menifee, Merced, Milpitas, Montebello, Montclair, Monterey, Moreno Valley, Morro Bay, Mountain View, National City, Norco, Norwalk, Oakland, Orinda, Oxnard, Pacific Grove, Palo Alto, Palmdale, Palm Desert, Palm Springs, Paramount, Pasadena, Paso Robles, Petaluma, Pittsburg, Pismo Beach, Pomona, Porterville, Redondo Beach, Reedley, Richmond, Riverside, Rohnert Park, Roseville, Sacramento, San Anselmo, San Bernardino, San Francisco, San Jacinto, San José, San Luis Obispo, Sanger, Santa Ana, Santa Clara, Santa Cruz, Santa Fe Springs, San Juan Capistrano, Santa Barbara, Santa Monica, Santa Paula, Santa Rosa, Sausalito, Scotts Valley, Seal Beach, Seaside, Selma, South El Monte, South Gate, South Lake Tahoe, South Pasadena, Stanton, Stockton, St. Helena, Sunnyvale, Temecula, Turlock, Vallejo, Ventura, Visalia, Wasco, West Hollywood, Westminster, Wildomar, and Whittier.**

2.3 Experience Conducting Research in Modestly Sized Communities

With approximately 8,475 likely November 2022 voters in the City of Marina, conducting a voter opinion survey that is both statistically reliable and generalizable to the broader electorate will require the research team to overcome a specific set of challenges. In the current communications environment, securing adequate participation from respondents presents an ever-growing challenge for research organizations of all types—a challenge that is exacerbated in instances when the population of interest presents a relatively small number of potential respondents to begin with.

FM3 has successfully conducted research in dozens of communities similar in size to Marina. Over the course of more than three decades working in these communities, our firm has developed a unique set of protocols which ensure that our surveys achieve an adequate sample size even when the pool of registered voters in the subject jurisdiction is small. These protocols include:

- 1) Cross-referencing voters' names and home addresses against commercially available consumer data to ensure that their contact information (landline + cellular phone numbers and email addresses) are current, so that individuals who have recently changed their email address or telephone number are able to participate in the survey;
- 2) Leveraging FM3's dual-mode (with text messaging) data collection methodology to invite voters to take the survey, and interview them, via multiple platforms, including email and text message invitations as well as online and telephone interviewing;
- 3) Scheduling call-back appointments for potential respondents who are willing to take the survey but are unable to do so when initially reached; and
- 4) Reducing the pace of survey interviewing to ensure the optimal amount of time between contact attempts to reach the same voter.

These protocols – particularly when used in combination, as we would do for this project – have enabled FM3 to maintain incidence rates (the willingness of eligible respondents to take our surveys) that are above the industry standard since the firm's inception.

A partial listing of California cities of analogous size to (or smaller than) Marina that have utilized FM3's research and consulting services to help pass local finance measures include **Arcata**, **Canyon Lake** (two measures), **Capitola** (two measures), **Carpinteria** (two measures), **Chowchilla**, **Clearlake**, **Cloverdale**, **Commerce** (two measures), **Cotati** (three measures), **Delano** (two measures), **East Palo Alto** (two measures), **Exeter**, **Grover Beach** (three measures), **Half Moon Bay**, **Healdsburg** (two measures), **Hermosa Beach**, **Kingsburg**, **Lakeport**, **La Palma**, **Larkspur** (two measures), **Lomita**, **Los Alamitos** (two measures), **Morro Bay** (two measures), **Reedley** (two measures), **San Anselmo**, **Sanger** (two measures), **Santa Fe Springs** (two measures), **Santa Paula** (two measures), **Sausalito**, **Scotts Valley**, **Seaside** (three measures), **South El Monte**, **South Lake Tahoe**, **St. Helena**, and **Wasco**, among other communities.

2.4 Experience & Familiarity with the Issues Facing California Municipalities

FM3 stays well informed on the latest issues facing local governments through its work as the public opinion research firm for the League of California Cities. FM3 has served as the League's primary pollster for many years, and our research has contributed to numerous victories for the League and its member agencies, both in the legislature and on the statewide ballot. In this capacity, we regularly conduct research at the statewide level as well as in dozens of local communities throughout California. Most recently, FM3 worked closely with the League to help preserve local authority over land-use and housing issues from encroachment by Sacramento and to shore up support for former Governor Brown's transportation funding package, Senate Bill 1. Our team also regularly

conducts seminars and forums with the League to advise city leaders about how public opinion research can be used to address the concerns, needs and priorities of their residents, and to provide additional funds for city services.

3 PROJECT PERSONNEL

3.1 John Fairbank, Partner – Project Manager



John Fairbank has more than forty years' experience in public opinion research and policy analysis, specializing in ballot measures and advising candidates on national, state, and local levels. As a founding partner of Fairbank, Maslin, Maullin, Metz & Associates (FM3 Research), he has consulted for clients in the areas of government, politics, education, business, non-profits, and labor. **John served as Project Manager for the research FM3 conducted for the City of Marina in 2016 related to your successful business license tax, Measure U.**

John works extensively on ballot propositions, initiatives, and referendums that focus on public services such as transportation, education, affordable housing, water, libraries, parks and recreation, conservation, environmental/climate protection, health care, cannabis, and public safety – particularly state and local bond and special tax measures. Most recently, his research in support of Proposition 19 on California's November 2020 statewide ballot helped close a notorious loophole in California's property tax system while providing additional critically needed revenue for local fire protection. His statewide research also played a key role in securing legislative approval for Governor Brown's transportation funding package, SB-1, in 2017, and defending that same funding in 2018 by helping pass Proposition 69 (a constitutional amendment dedicating all SB-1 revenues for transportation) and defeating Proposition 6, a measure which threatened to repeal SB-1's \$5 billion to \$6 billion in annual gas taxes. His work in 2018 also aided the passage of both Proposition 1 and Proposition 2, providing a combined \$6 billion in funding for affordable housing – including dedicated funding to create housing for Californians experiencing mental illness and homelessness.

On the local level, John's research on behalf of California cities has resulted in voter approval of billions of dollars in capital improvements and hundreds of millions more in ongoing operational funds raised by both dedicated and general-purpose tax measures in more than 100 California cities and counties. In the November 2020 election alone, his successful clients included the cities of Carson, Commerce, Corona, Imperial Beach, Los Alamitos, Long Beach, Oxnard, Paso Robles, Pismo Beach, San Bernardino, San Jacinto, South Lake Tahoe, and Turlock. His research has also been instrumental in securing the passage of nine countywide finance measures in Los Angeles County since 1996.

In addition to his research for political and public agency clients, John has consulted for both business and non-profit sectors. He has worked for many leading companies and organizations including The Walt Disney Company, NBC/Universal, Airbnb, and Mercury Insurance. In the non-profit sector, John has advised such organizations as

The Nature Conservancy, the Trust for Public Land, the League of California Cities, the California Association of Realtors, California's Coalition for Adequate School Housing (C.A.S.H.), the Building Industry Association of California, and the California School Boards Association.

John graduated from UCLA and serves as a Senior Fellow at the UCLA Luskin School of Public Affairs. He lives in Los Angeles. Mr. Fairbank may be reached in the firm's Los Angeles office at (310) 828-1183, or via email: john@fm3research.com.

3.2 Adam Sonenshein, Vice President – Assistant Project Manager



Vice President Adam Sonenshein came to FM3 Research in 2013, following over a decade of experience working on behalf of non-profit organizations and political candidates in California. He has conducted opinion research and evaluation and provided strategic advice for dozens of clients including cities and counties, K-12 school and community college districts, non-profit organizations, business associations, candidates running for political office and ballot measure campaigns.

In 2020, Adam contributed research and strategic guidance that secured the passage of 24 local ballot measures for cities, counties and local school districts across California. Adam is also a lead member of the research team for the UCLA Quality of Life Index project, a multi-year public assessment of quality of life in Los Angeles County, and polling for The Voice of San Diego on quality of life and trust in local institutions in San Diego County.

More broadly, his research has explored attitudes on a range of issues including the impacts of COVID-19, public safety, reducing homelessness, environmental protection, housing and land use, public transportation, cannabis decriminalization, K-12 and early childhood education, strategies to address poverty, and making the political system more transparent and fairer.

Prior to joining FM3, Adam spent over a decade working on behalf of non-profit organizations and political candidates in California. He spent eight years with Los Angeles Universal Preschool (now Child360), a county-wide nonprofit organization focused on building public will for expanding access to quality preschool education. He was responsible for developing the organization's public policy, advocacy, and community involvement strategies. Further, he has served as a consultant for political campaigns, coalitions, and public awareness campaigns in the San Francisco Bay Area.

Adam received a Bachelor's degree in Political Science from Tufts University in 1998 and an Master's of Public Policy (M.P.P.) from the UCLA Luskin School of Public Affairs in 2005 with awards for Outstanding M.P.P. Student of the Year and Outstanding Academic Achievement. Adam can be reached in FM3's Los Angeles office at (310) 569-3653 or at adam@fm3research.com.

3.3 Miranda Everitt, Vice President – Research Team Member



FM3 Research Vice President Miranda Everitt has experience in municipal finance research for scores of cities, counties and school and special districts throughout the country. **She served as Assistant Project Manager for FM3's 2016 research for the City of Marina.** Outside of her local work, she has focused on her research on drug policy reform, conservation, and climate policy. Her work has contributed to the passage of state and local ballot measures in Arizona, California, Colorado, Florida, Maine, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, New Jersey, New York, Nevada, North Dakota, Oregon, Rhode Island, South Dakota, Texas, Utah, Washington and Washington, D.C.

In addition to her work on the City of Marina's Measure U, since 2015 Miranda has helped shape successful ballot measures providing billions of dollars in new funding for parks, libraries, public safety, roads and housing in communities throughout California including San Jose (three measures), Arcata, Alameda (two measures), Calaveras County, Humboldt County (three measures), Clearlake, Cotati (two measures), Desert Hot Springs, Diamond Bar, East Palo Alto, Lakeport, Menifee, Millbrae, Milpitas (two measures), Orinda (four measures), Palo Alto, Santa Clara County, Santa Paula, Seaside, Sunnyvale, Wasco, and Wildomar. Outside California, she has helped passed public finance measures in Denver, Colorado; Portland, Milwaukie, Deschutes and Multnomah counties in Oregon; Chaffee County, Colorado; New Paltz, New York; New Smyrna Beach, Florida; and in the city and county of Missoula, Montana.

Miranda's research contributed to historic victories for drug policy reform across in the country in November 2020. Voters legalized marijuana for adult use in traditionally conservative states including Montana and South Dakota and approved medical marijuana in Mississippi. In Oregon, she worked to help develop Measure 109, which will allow promising psilocybin therapy to treat depression, end-of-life anxiety, and PTSD. Measure 110, which will decriminalize personal use possession of all drugs, redirecting resources to public health and treatment. Initiative 81 will make entheogens Washington, D.C.'s lowest law-enforcement priority. Since 2015, she has contributed research on campaigns to allow medical or recreational marijuana in a dozen states and helped local governments approach taxation and regulation of this new industry; her work continues to inform legislative and ballot-measure drug reform campaigns in other states.

Miranda came to FM3 with experience in communications and policy research at California Budget and Policy Center, SEIU Healthcare MN, Chief Justice Earl Warren Institute for Law and Social Policy, Justice in Aging, and the Alameda County Community Food Bank. Prior to her policy career, she worked for the *Oakland Tribune*, *San Jose Mercury News* and *Toledo Free Press*.

Miranda holds a Master's of Public Policy from the Goldman School of Public Policy at UC Berkeley and a journalism degree from Bowling Green State University in Ohio. Miranda can be reached at miranda@fm3research.com.

3.4 Renato Villacorte, Partner & Chief Technology Officer – Lead Statistician



Partner & Chief Technology Officer Renato G. Villacorte joined FM3 Research in 2002 as the Senior Statistician and consultant on research methodologies and advanced data analyses. Renato started his career in academia in Experimental Psychology where he developed expertise in data collection technologies, statistical programming, and predictive modeling. He taught Descriptive Statistics and other lower division Psychology courses at Cal State University Los Angeles before entering a doctoral program at the University of California in 1996. At Cal, he pursued research in Psychophysics and conducted several studies with human subjects before taking his talents into the market research industry in 2000.

Prior to joining FM3, Renato was the Database Programming Manager and a Senior Market Research Analyst for Jackson National Life Insurance, a major financial services company. He analyzed and prepared reports based on financial transaction data and data collected from employee and sales associate surveys. As the Senior Analyst, he helped create and manage the company's Market Research Department and earned recognition as a SAS Certified Professional Programmer. Renato's technical expertise and leadership skills ultimately earned him the position of Database Programming Manager where he trained and supervised several programmer/analysts.

Renato is now charged with developing and maintaining the research technologies of FM3 Research. The Researchers of FM3 depend on Renato's team to coordinate and organize the collection of qualitative and quantitative opinion research data, prepare analytical reports on collected data, and conduct advanced statistical investigations in support of research objectives. Renato is one of the principal liaisons between FM3 and market research service subcontractors. He advises FM3 Researchers on the latest techniques in data collection and sampling methodologies. He also manages the training and development of FM3's Statistical Analysts and Data Processing Manager; the team that's vital in providing rapid and accurate analyses of quantitative data. Renato also leads the team that conducts advertisement and marketing material testing with Perception Analyzer, a system that collects data using dials in a group setting. This technology has supported dozens of high budget campaigns in evaluating the persuasiveness of television advertisements on the electorate.

Renato received his cum laude B.A. and M.A. in Psychology from the California State University, Los Angeles and a M.A. in Psychophysics from the University of California. With more than two decades of experience in data analysis and survey research methods, Renato remains active in the professional communities of the American Association of Public Opinion Researchers and the SAS Software Programming organizations. He continues his professional education through annual seminars and conferences and has presented papers and tutorials to fellow analysts and researchers. He is an active alumnus of the Sigma Phi Epsilon Fraternity which supports his network of consultants and experts in every career field and professional society. Renato may be reached in FM3's Los Angeles office at (310) 828-1183, or at renato@fm3research.com.

4 SCOPE OF WORK

4.1 Research Approach & Methodology

For this project, FM3 recommends conducting a dual-mode baseline survey among a sample of up to 300 City of Marina registered voters likely to participate in the November 2022 statewide general election. This survey would feature an average interview length of 20 minutes. Such a survey length will allow for the questionnaire to include approximately 30-60 unique questions (including demographic questions), sufficient length to explore multiple aspects of the potential G.O. bond measure and identify which incarnation(s) are likely to enjoy the greatest public support.

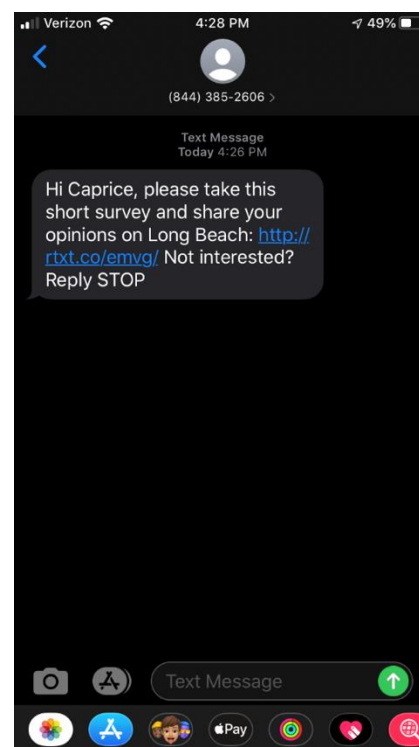
Survey Methodology

Based on our examination of past voting history, the City of Marina has a total of approximately 8,475 registered voters who are likely to vote in the November 2022 statewide general election. **FM3 recommends surveying a random sample of up to up to 300 likely voters**, yielding a margin of sampling error of +/- 5.7% for the full sample. (The margin of sampling error for population subgroups - based on gender, race/ethnicity, homeownership, among other demographic categories - will be greater.)

Our team recommends the continued use of a **dual-mode, online and telephone (landline and wireless) interviewing methodology** for this survey, which is consistent with the approach used for FM3's 2016 survey for the City of Marina. This approach for gathering statistically reliable data involves deploying the traditional telephone survey methodology alongside the latest online survey applications, with invitations to take the survey online distributed to potential respondents via email and (in the case of cellular phones) by text message¹. In instances where a potential respondent is randomly selected to take the survey online but does not promptly respond to the email invitation to do so (and a cellular telephone number for this individual is also available), FM3 will follow-up with a text message invitation as a reminder – an example of which is shown in **Figure 2**. This relatively new survey contact approach was not standard practice at the time of FM3's 2016 survey for the City, but has since been found to improve response rates to online surveys.

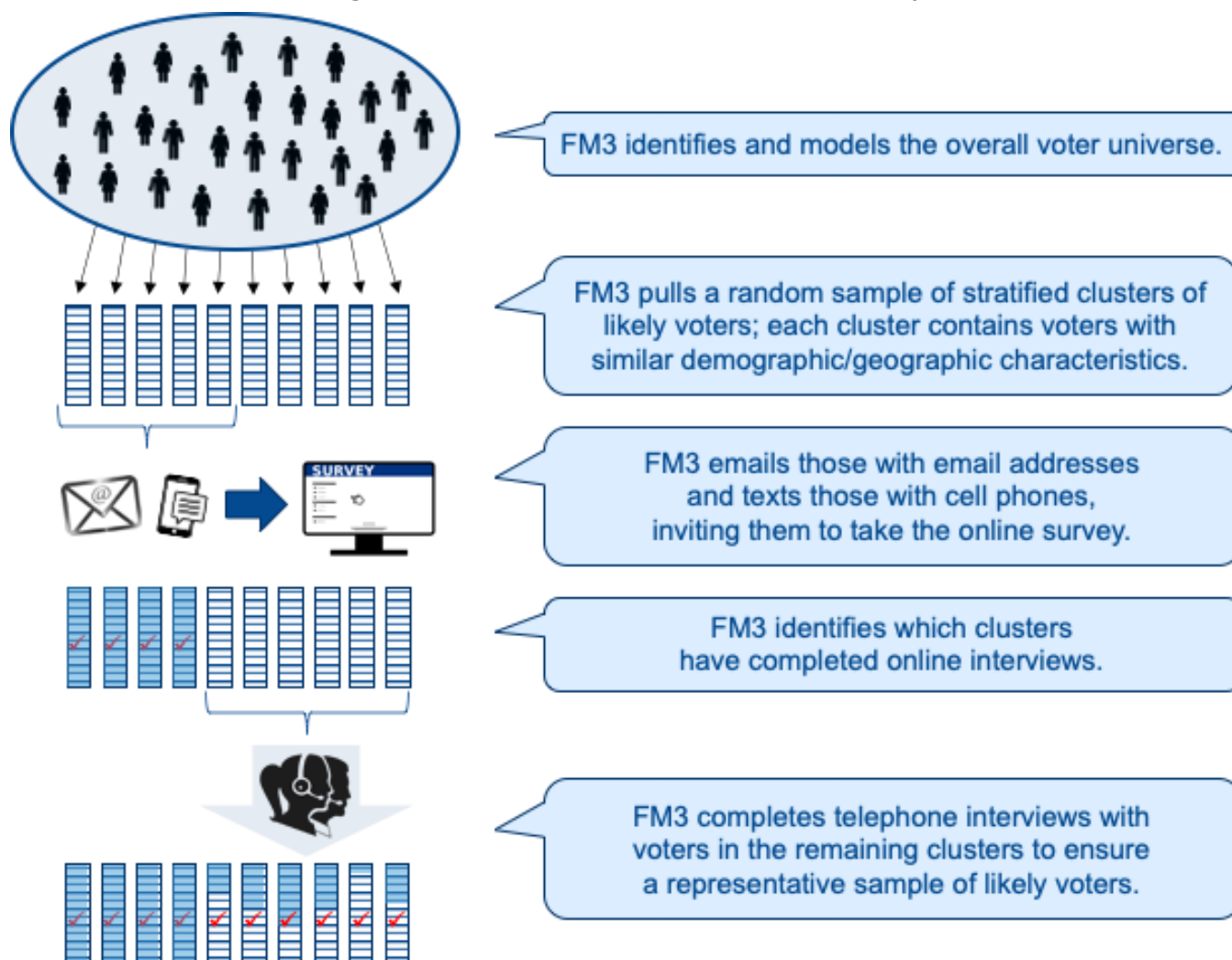
Combining the data from the telephone and online surveys produces an **all-inclusive, representative sample of the population of interest**, as illustrated by **Figure 3**.

Figure 2: Sample FM3 Text Message Survey Invitation



¹ FM3's use of text messages to distribute survey invitations has been vetted by independent legal counsel and determined to be compliant with all applicable state and federal laws and regulations, including the U.S. Telephone Consumer Protection Act (known as the TCPA).

Figure 3: Illustration of FM3 Dual-Mode Voter Survey



FM3 will utilize Political Data, Inc. (PDI) as its sample vendor. FM3 has worked with PDI, the leading voter sample vendor in California, for the last two decades. PDI provides the most up-to-date lists of voter names, addresses, telephone numbers (listed, unlisted, and cell phones), email addresses, voter party registration, and past voter history (in which past elections individuals have voted) directly from the County Registrar of Voters. In addition, PDI works with third-party vendors to match names and addresses on the voter file with other commercial vendor lists to update phone numbers and email addresses on file and find more current contact information for residents who registered to vote many years ago.

This helps ensure that all eligible voters have the same likelihood of being contacted, regardless of whether they have changed their phone number or email address since registering to vote.

Questionnaire Design

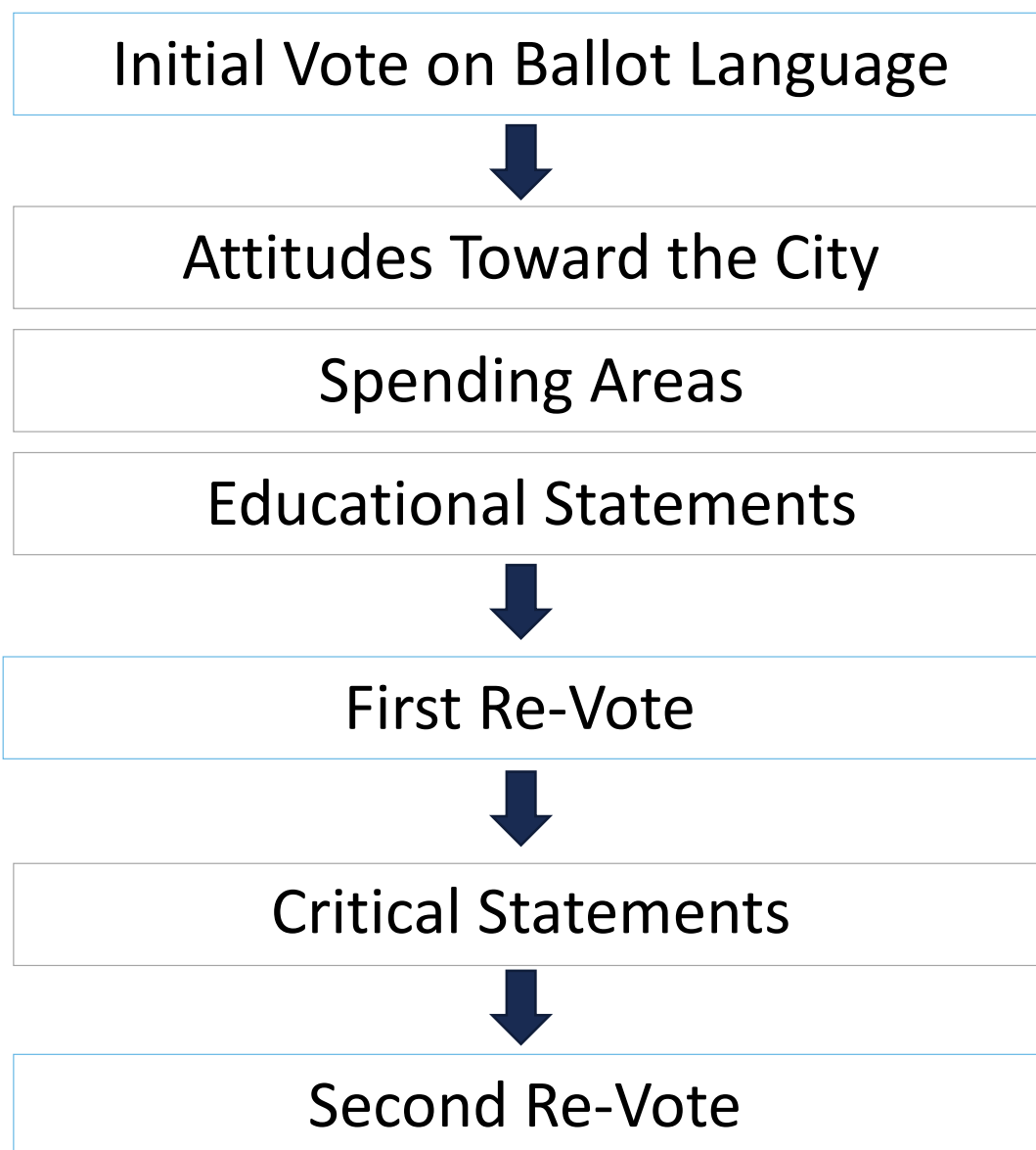
In designing the research for this project, FM3 will draw from our knowledge of public opinion survey methodology; our comprehensive understanding of the City of Marina's past survey research, including tracking past questions when appropriate; the City's current and future objectives and needs; and our own vast library of research for Marina and other municipalities. The process will begin with an initial kickoff meeting via webconference between the FM3 team, other relevant consultants and City staff members assigned to this project, during which we will hold a comprehensive discussion of major issues or challenges that should be explored in the survey. FM3 will then present a first draft of the questionnaire to the City for review and comment. After collecting feedback on the first draft, we will revise and refine the survey. We foresee proceeding through several drafts, incorporating feedback from City staff before each revision to develop a research instrument that will obtain all the information desired. Before interviewing commences, FM3 will secure approval from the appropriate City representative on the final version of the questionnaire. We have found this approach is a very effective way to ensure that City leadership has the opportunity to prioritize issues to explore in the survey and that we can provide actionable, useful data that helps support the City's goals.

Our approach to municipal finance measure surveys has been developed over the course of several decades. For this project, as a starting point, our firm recommends following the model we successfully used in Marina in 2016, with a survey questionnaire design that simulates an actual bond measure campaign. First, voters will respond to the possible measure unprompted by any previous information. Survey participants will then respond to a series of legally permissible educational statements that could be used during community outreach (simulating potential outreach efforts by the City), and the measure is tested again to gauge the impact of that outreach. Following that, participants will also respond to critical statements, mimicking a possible opposition campaign. Once voters receive all information, the proposed measures' favorability is tested for a third time in order to best understand the impact of that information on the likely outcome for the measure. The survey will also test individual characteristics of the measure(s), which could include the viability of various authorization amounts and tax rates; voters' budgeting and spending priorities; and the level of support in different geographic communities within the City. If the measure appears viable, the questionnaire will provide a roadmap to drafting legally permissible educational outreach materials. Our findings will also help draft the most efficient 75-word ballot language and inform best practices for community engagement. However, as we have demonstrated in our prior work with the City of Marina, we believe in customizing each questionnaire to the City's needs and we will not hesitate to be flexible with our approach if it is necessary based on the City's priorities.

While the final list of questions will be developed after consultation with all team members involved, the survey will include a variety of relevant demographic questions such as race/ethnicity, age, and education, among others. Geographic data (the home address each respondent provided to the County Clerk-Recorder/Registrar of Voters when they registered to vote), age, participation in past elections, as well as partisan affiliation will be provided by the voter file.

A visualization of the survey questionnaire structure and sequence recommended by FM3 is provided by **Figure 4**.

Figure 4: Survey Questionnaire Structure/Sequence



Translation

Given the comparatively high percentage of Marina likely voters who are **of Latino/Hispanic origin (20%)**, **we will secure professional translation of the survey into Spanish and conduct interviewing in both English and Spanish.**

Interviewing

FM3's data collection (web hosting, email invite distribution, telephone interviewing, and online interviewing) vendor is a national leader in the collection of public opinion research data. The firm's online interviewing platform is optimized to enable respondents to easily take the survey from either a personal computer or tablet/smartphone device, providing respondents with enormous flexibility regarding when and how they can participate. Further, we provide specialized expertise with fluent multilingual (English/Spanish) survey

administration as well as culturally competent data collection among populations with a significant U.S. Latino component.

In addition, FM3's telephone interviewing facilities have well-established procedures to supervise the interviewing process and to verify that interviews are conducted according to specifications. Among these procedures is the monitoring of actual interviews by on-site supervisors, identification of each interview by interviewer, and the use of a regularly employed staff of professional, full-time interviewers who are fluent in both English and Spanish. There is an established protocol for callbacks of busy or "not-at-home" numbers designed specifically to maintain the randomness of interviewee selection.

FM3 proposes to review its procedures with City representatives prior to commencing interviews to ensure satisfaction with all technical aspects of the interviewing process.

Data Analysis/Reporting

Response data will be analyzed by FM3's Data Processing and Analysis Department staff using Survey System and SAS software, both well-documented and widely used data analysis software packages. As needed, FM3 may augment Survey System and SAS with its own custom-designed statistical analysis program to report the tabulation and cross-tabulation of data. The Data Processing and Analysis Department staff employs a data checking and editing system to eliminate errors and document the handling of data received from the interviewers.

The cross-tabulated results will include a table for each question or demographic variable in the survey, with a series of up to 200 columns indicating how various subgroups of Marina voters responded to that question. The cross-tabulated results will make it possible to detect how responses differ, if at all, among various subsets of Marina voters. For example, it will be possible to compare responses made by men and women, voters of various age categories, responses based on ethnicity/race, homeowners and renters, and many more subgroups of the electorate.

The data analysis will be used to draft the final PowerPoint report/presentation for the City. The report will track changes in public awareness and perceptions from prior survey years where appropriate, and provide clear, actionable recommendations regarding how to use the survey results to achieve your objectives.

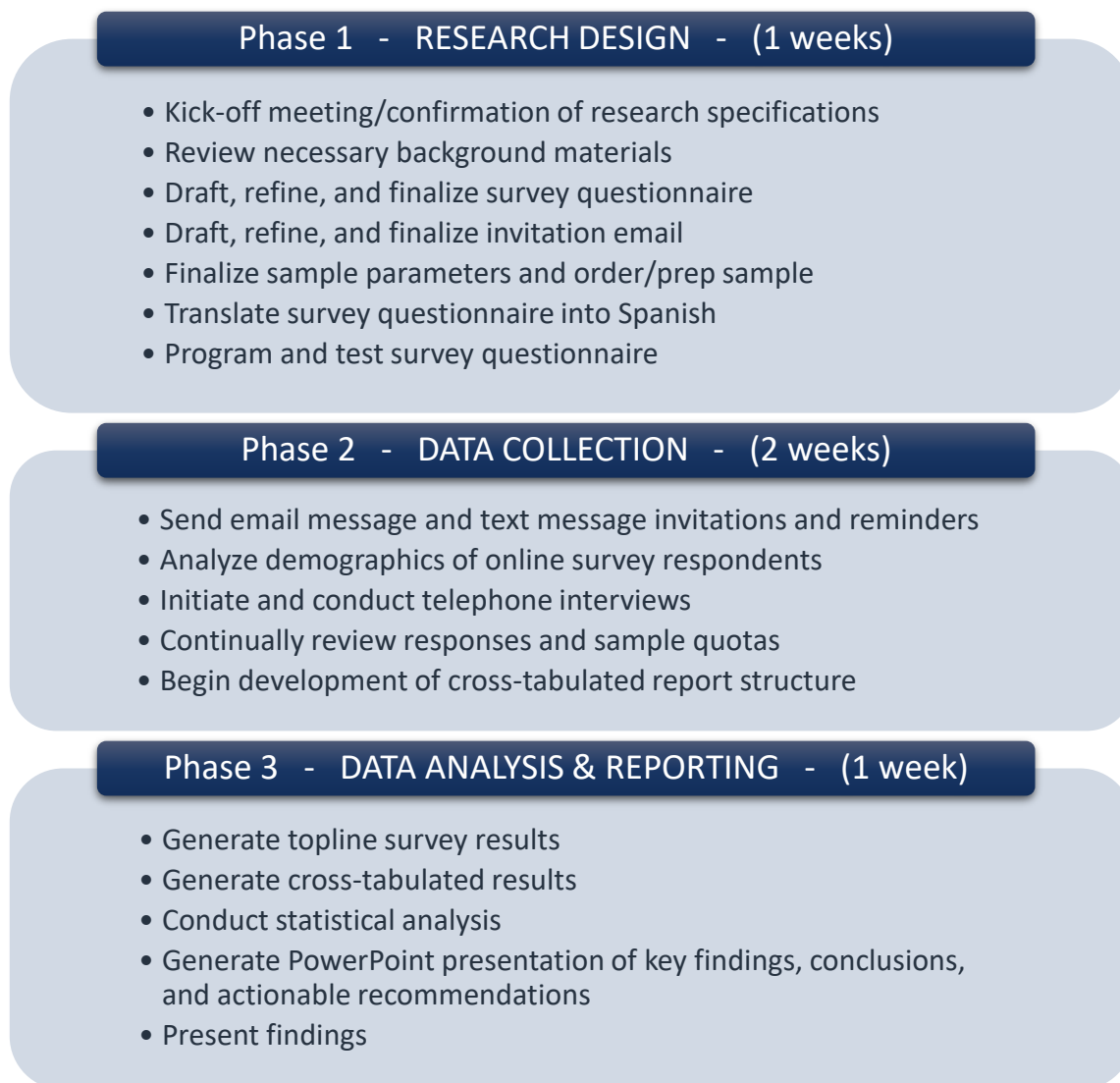
After our presentation to City representatives, FM3 will remain available to answer follow-up questions from the City and present results to the City Council and key stakeholders as requested. We view all survey responses as an ongoing data resource; should the need arise, FM3 can perform further analysis to answer follow-up questions that may be posed by the City or other interested parties.

4.2 Project Timeline

FM3 is prepared to begin work on this research project immediately upon contract execution and expedite its completion in order to maximize the length of time available to the City to engage and communicate with your community regarding a potential finance measure before any such measure(s) are formally placed on the ballot. We would approach the project in three distinct phases: research design, data collection, and data analysis and

reporting. As shown in **Figure 5**, the expedited research process would take roughly four weeks from kick-off to complete.

Figure 5: Dual-Mode Voter Survey Research Phases & Timeline



At the conclusion of Phase 3, FM3 will remain available for ongoing consultation and any further analysis and presentation of the research, as needed – including helping to develop the 75-word ballot label language should the City opt to move forward with placing a measure on the ballot.

4.3 Deliverables

Following the completion of the survey, we will provide:

- ✓ A questionnaire with the topline results of the survey for easy reference

- ✓ A complete set of crosstabs in an easy-to-read, comprehensive format
- ✓ Verbatim responses to any open-ended questions
- ✓ A complete analysis of survey results in PowerPoint format
- ✓ Presentation(s) of the survey results (in person or remotely via secure weblink) to City staff, elected officials and/or other stakeholders as desired

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

4.4 Project Budget

For this project, FM3 recommends conducting a baseline survey with up to 300 interviews taking the average phone respondent 20 minutes to complete, with interviewing conducted by telephone (cell phones and landlines) and online with respondents invited to the online survey via email and text message. The survey will be available by phone in both English and Spanish. The total cost for this survey with up to 300 interviews would be **\$29,750**.

These cost figures are each all-inclusive, and reflect all charges for questionnaire development, survey hosting, email and text message distribution, Spanish translation, bilingual telephone interviewing, data entry, cross-tabulation, data analysis, and preparation and presentation of survey results. In addition, these prices represent a commitment by FM3 to remain on call to the City, as needed, for the remainder of your revenue measure project. Direct incidental expenses, such as extra reproduction of reports, are not included but would be billed at-cost if incurred.

Honorable Mayor and Members
of the Marina City Council

City Council Meeting
of May 17, 2022

**CITY COUNCIL CONSIDER ADOPTING RESOLUTION NO. 2022-
APPROVING AGREEMENT BETWEEN CITY OF MARINA AND
FAIRBANK, MASLIN, MAULIN, METZ & ASSOCIATES (FM3) FOR
PUBLIC OPINION RESEARCH SERVICES, AUTHORIZING
SUBSEQUENT MINOR CHANGES IF NECESSARY, WITH CITY
ATTORNEY APPROVAL, AUTHORIZING CITY MANAGER TO
EXECUTE AGREEMENT ON BEHALF OF CITY AND AUTHORIZE
THE FINANCE DIRECTOR TO MAKE THE NECESSARY
ACCOUNTING AND BUDGETARY ENTRIES**

REQUEST:

It is requested that the City Council consider:

1. Adopting Resolution No. 2022- approving agreement between City of Marina and Fairbank, Maslin, Maullin, Metz & Associates (FM3) for public opinion research services,
2. Authorize subsequent minor changes if necessary with City Attorney approval, and;
3. Authorize City Manager to execute agreement amendment on behalf of City, and;
4. Authorize the Finance Director to make the necessary accounting and budgetary entries.

BACKGROUND:

The City Council is currently considering the possibility of placing a ballot measure for the November 8, 2022 elections for consideration of a General Obligation Bond for the construction of critical city facilities that may include a new fire station, police station, senior center, city hall or other facilities. This action will require voter approval and is likely to be of intense interest to the City's residents and businesses. California local governments commonly engage outside consultants to assist them in (i) developing ballot measures that will meet community needs, (ii) seeking community input into proposed measures, and (iii) responding to the community's need for factual, public information regarding proposed measures. The discussion regarding the need to replace city facilities started in early 2021 as part of the budget process for adoption of the Fiscal Year 2021/22 and 2022/23 budget. Additionally, the City Council held public meetings in January and April of this year to continue the discussion regarding replacing city facilities and to continue to get community input and feedback.

ANALYSIS:

In order to better gauge community interest and obtain community feedback, the City can hire a public opinion research firm to conduct a community research survey. Local governments often engage such a research program when developing ballot measures and potentially controversial programs or policies.

Fairbank, Maslin, Maullin, Metz & Associates (FM3) has conducted community research for over 146 California cities dealing with issues such as public safety, libraries, parks,

infrastructure, health care, open space, social services, and transportation, and FM3 research has resulted in voter approval of 607 local finance measures for California agencies since 2008 with a success rate greater than 95 percent. Previously, the City has used the services of FM3 in our successful 2016 Business License Tax (Measure U).

FM3 is active in the Monterey Peninsula and its constituent communities, providing research for the Cities of Pacific Grove, Monterey, Salinas and Seaside, the Monterey Peninsula Community College District, Monterey Peninsula Unified School District and the Monterey Peninsula Regional Park District. FM3's research has helped pass a total of 18 local agency finance measures in Monterey County.

The survey will be conducted using FM3's dual-mode (online and telephone) baseline survey among a sample of up to 300 City of Marina registered voters likely to participate in the November 2022 statewide general election. This survey would feature an average interview length of 20 minutes. Such a survey length will allow for the questionnaire to include approximately 30 – 60 unique questions (including demographic questions), sufficient length to explore multiple aspects of the potential General Obligation bond measure and identify which incarnation(s) are likely to enjoy the greatest public support.

The total cost for this survey with up to 300 interviews would be \$29,750. This is an all-inclusive cost reflecting all charges for questionnaire development, survey hosting, email and text message distribution, Spanish translation, bilingual telephone interviewing, data entry, cross-tabulation, data analysis, and preparation and presentation of survey results. This cost does not include direct incidental expenses, such as extra reproduction of reports, that would be billed at-cost if incurred. The professional agreement is provided as **EXHIBT A**.

FISCAL IMPACT:

The total cost of the contract with Fairbank, Maslin, Maullin, Metz & Associates (FM3) is an amount not to exceed \$29,750 plus incidental expenses. This is proposed to be funded from Unallocated General Fund Balance.

CONCLUSION:

This request is submitted for City Council consideration and possible action.

Layne P. Long
City Manager
City of Marina