BALLOT MEASURE POLLING AND OUTREACH CONSULTANT SERVICES

City of San Carlos

April 28, 2025

TeamCivX | TrueNorth RESEARCH

CONSULTANT PROFILE

ABOUT TEAMCIVX

TeamCivX brings decades of experience helping cities and other public agencies navigate the ballot measure process to achieve locally controlled funding. We've helped secure tens of billions of dollars in locally controlled funding for jurisdictions throughout our home state of California, including countless successful projects right here in the Bay Area. We are project management and communications consultants with unmatched experience evaluating the feasibility of local funding measures, designing measures for the ballot that align with community priorities, and implementing informational communication efforts to raise awareness of funding needs. We pride ourselves on being good team players who listen to our clients; seamlessly collaborate with pollsters, financial advisors, bond counsel, and other municipal advisors; and develop unique approaches for each client that maximize their likelihood for success while maintaining a local, homegrown feel.

UNMATCHED EXPERIENCE AND EXPERTISE

TeamCivX has passed hundreds of ballot measures for a diverse set of municipalities throughout our home state of California. We maintain a success rate of over 90% and our experience includes parcel taxes, bond meaures, sales taxes, utility taxes (UUTs), hotel taxes (TOTs), CFDs, property transfer taxes, vacancy taxes, assessments, business license taxes, fees, and more.

Specifically in San Mateo County, we've helped pass dozens of revenue mesaures for the majority of the school districts and cities, as well as SamTrans, Caltrain, and the County. We know the Peninsula well and enjoy working close to home. While we are a fully remote company, our partners are all based in the Bay Area. Partner Jeremy Hauser, who would be your project leader, is just a 30 minute drive away in San Francisco.

COMMITMENT TO CLIENT SERVICE

We view our working relationship with our clients as a partnership. We know public finance measures, and you know your community. We also understand that the reputation of your agency is at stake when you seek funding from your community. Your measure and the related messaging must help you strengthen your relationship with your neighbors. We take the responsibility of communicating with your constituents seriously and give it the professional time and attention it deserves.

EXPERTS IN TODAY'S COMMUNICATION TOOLS

A big part of our job is to help you get the right message to the right people to build public awareness of your funding needs. People receive their information in a variety of ways these days. We are experts in traditional communication methods including direct mail and earned media, as well as new media, including digital advertising, social media, and video.

Taxpayer-funded communications require a specific tone and tenor. We have extensive experience helping cities craft effective public informational materials that don't cross the line into advocacy. We work closely with our clients and their legal counsel to ensure our public outreach efforts represent best practices, reflect community values, and make the case for your need in plain, easy to understand language that's legally compliant.

ABOUT TRUE NORTH RESEARCH, TEAMCIVX'S RECOMMENDED POLLSTER

For this project, TeamCivX is partnering with True North Research, the pollster of record for the City of San Carlos for the past 15 years. True North is a full-service survey research firm that is dedicated to providing California municipalities and public agencies with a clear understanding of the opinions, perceptions, priorities, and behaviors of their residents and customers. Through designing and implementing scientific surveys, focus groups, and one-on-one interviews, as well as expert interpretation of the findings, True North helps its clients to move with confidence when making strategic decisions in a variety of areas — such as performance measurement, planning, establishing budget priorities, passing revenue measures, and developing effective public engagement/communications strategies.

As specialists in research methodology and the public sector, True North's clients span the full range of public agencies including cities, counties, special districts, utilities, councils of government, educational institutions, state agencies, and federal agencies. The diversity of our public sector clientele has enabled us to perform research at the local, regional, state, national, and international levels.

True North Research was co-founded in 2002 as a two-person survey consulting firm by Dr. Timothy McLarney and Mr. Richard Sarles and is a certified Small Business Enterprise (SBE) and S-Corporation in good standing with the State of California. Although we have had many opportunities to expand our business during the past 23 years, we have chosen to maintain True North as a two-person research team. Dr. McLarney and Mr. Sarles still manage every aspect of every True North project. We are an extremely efficient, collaborative team of two — and we have chosen to keep it that way so that our clients continue to receive exceptionally high-quality customer service and research insights.

Our approach to managing projects is one of the things that makes True North unique, as every task of your study will be performed by a highly trained principal with 25+ years of experience. Put another way: You do not need to pick up the phone to get the attention of our principals — we are there with you at every step, doing (not delegating) the research.

APPLICABLE EXPERIENCE

WINNING WITH ACCURATE, RELIABLE DATA

TeamCivX has helped public agencies across California secure the funding they need through successful revenue measure elections. While we've worked up and down California, our roots are in the Bay Area, where we bring deep local experience and a strong track record. Our partners have passed more measures than any firm in our industry and have maintained a 90% success rate, well above the state average. A complete list of our clients is included as an attachment to this proposal.

True North has the highest verifiable success rate in the State of California for revenue measures over the past decade (93%), and a 100% success rate in seven of the past ten election cycles. To date, we have helped our clients raise over $42 billion in voter-approved funding, including more than $7 billion in the past year alone (2024) to support essential services and facilities. Our experience includes all types of revenue measures including general and special sales taxes, parcel taxes, bonds, transient occupancy taxes, utility users' taxes, real estate transfer taxes, business license taxes, benefit assessments, and property-related fees.

RELEVANT CASE STUDIES

CITY OF SANTA CLARA

In 2024, TeamCivX helped the City of Santa Clara place — and eventually pass — Measure I, a $400 million bond, on the ballot. The City needed to address aging infrastructure, including roads, storm drains, and fire stations. With careful planning and a targeted communications strategy, TeamCivX helped the City engage residents through community meetings, surveys, mailings, social media, and other outreach efforts. On Election Day, Measure I passed with 69% support.

CITY OF SAN MATEO

TeamCivX and True North partnered with the City of San Mateo to help pass a key amendment to its General Plan. San Mateo has a complex history with zoning, with several past measures leaving a lasting impression on the community. Working with True North, we surveyed voters to gauge support and align the amendment's goals with community priorities. TeamCivX equipped City officials with the tools and messaging needed to engage effectively. A robust communications plan was developed and implemented, leading to a broad coalition of support. City officials met with over a hundred leaders and community organizations to bring them along throughout the process. Despite vocal opposition, Measure T passed with 59% support.

True North and the principals at TeamCivX also assisted the City of San Mateo with voter opinion research and strategic advice that led to the successful passage of a transient occupancy tax (2020) and a real property transfer tax (2022).

CITY OF SAN BRUNO

Facing aging infrastructure and over $500 million in estimated needed repairs, the City of San Bruno turned to TeamCivX for assistance. TeamCivX guided the City through the process of placing Measure Q, a $102 million bond, on the ballot. Working closely with City officials, a comprehensive communications strategy was developed and executed to engage residents and build a compelling narrative around the need for funding. On Election Day, Measure Q passed with 73% support.

CITY OF BURLINGAME

The City of Burlingame has partnered with TeamCivX partners on multiple successful measures. In 2022, we helped the City place Measure X, a business license tax, on the ballot. The measure passed with 75% of the vote, generating an additional $2.5 million in annual local funding. This followed our work on the successful passage of Measure I, a sales tax measure approved by 63% of voters in 2019.

CITY OF MANHATTAN BEACH

In 2024, TeamCivX and True North Research partnered with the City of Manhattan Beach to support two revenue measures through survey research, strategic guidance, and communications consulting. The first measure — a Prop 218 stormwater fee to address failing storm drains — was approved by 52% of property owners. Later that year, the City returned to the ballot with a general sales tax measure, which passed with 57% support from voters.

CITY OF CHULA VISTA

To renew a critical source of funding, the City of Chula Vista turned to TeamCivX and True North Research for support on its local sales tax measure. The team provided community priority surveys, revenue measure feasibility research, strategic guidance, and communications support. These efforts culminated in the successful passage of Measure P in 2024 with 73% voter approval. The partners of TeamCivX and True North also supported the original passage of the sales tax in 2016, as well as a sales tax increase approved by voters in 2018.

CITY OF MODESTO

After suffering a loss at the ballot box using a different consultant team, the City of Modesto selected TeamCivX and True North Research to design and conduct baseline and tracking surveys, provide strategic advice, and provide communications for a general sales tax measure. After thorough research and an extensive communications strategy, Measure H was placed on the November 2022 ballot and approved by 63% of voters.

CITY OF SAN MARCOS

Facing a looming funding deficit, the City of San Marcos partnered with TeamCivX and True North Research to conduct baseline survey research and provide strategic consulting. City leaders were equipped with the tools and insights needed to execute a robust communications and engagement strategy. On Election Day, Measure Q passed with 60% support.

We are happy to provide more case studies upon request.

STAFF QUALIFICATIONS & EXPERIENCE

JEREMY HAUSER — PARTNER, TEAMCIVX

A Bay Area native, Jeremy grew up in Oakland and Moraga and attended UC Davis, where he earned degrees in both Political Science and Communications, graduating with honors in each.

Jeremy was first bitten by the campaign bug while working on the SF Mayor's race in 2011 and hasn't looked back since. He did a stint in Washington DC, working for a top polling firm where he learned the incredible power of sound analytics and gained significant insight into the art of targeted messaging. He also spent an election cycle working in Denver, leading his candidate to a sweeping victory, seeing firsthand the benefits of a diligent and unrelenting grassroots effort.

For the past decade, Jeremy has focused his skillset as a General Consultant here in California, securing much-needed funding for cities, schools, housing, and public transit. Jeremy rarely works with a client once — his clients value his ability to develop meaningful relationships and his willingness to roll up his sleeves and work tirelessly to execute a winning strategy.

His creative approach to multimedia communication — blending traditional direct mail with new media digital strategies — has helped his clients stand out from the crowd and win hard-fought races. And as a former Field Organizer, he takes a very hands-on approach in designing effective grassroots campaigns. His clients win in the mailbox, online, on TV, and at the doors.

Jeremy is proud to be a Founding Partner of TeamCivX. He lives in Noe Valley with his wife and regularly spends time in San Mateo County, visiting his in-laws, family, and friends in Foster City, Burlingame, and San Mateo.

DR. TIMOTHY MCLARNEY — PRESIDENT, TRUE NORTH

As President of True North, Dr. McLarney leads the design, analysis, reporting, and presentation tasks for every True North study. He has occupied a lead role in over 1,500 research studies for public agencies in California and across the nation, and has more than 25 years of experience in survey methodology, statistics, public opinion analysis, and providing data-driven strategic advice to public agencies. To date, Dr. McLarney's research has led to over $42 billion in voter-approved revenue measures at the local level in California.

Dr. McLarney is a nationally recognized expert in survey research methodology, sampling theory, weighting, and the use of statistical methods to generalize survey results. His research has been published in academic journals and has earned him honors including the Andrew Mellon Fellowship (Cornell University), Sage Fellowship (Cornell University), and the title of Visiting Scholar at the Institute of Governmental Studies at UC Berkeley. He has also served as an independent expert witness in survey research methodology for California legal cases.

Dr. McLarney earned his Ph.D. and M.A. in Government from Cornell University with an emphasis in survey methodology, sampling theory, data science, and public opinion analysis, as well as a Bachelor's degree in Politics from UC Santa Cruz. Dr. McLarney has also had the privilege of being San Carlos' chosen research partner for 15 prior community surveys.

RECOMMENDED STRATEGY, APPROACH & TIMELINE

PHASE 1: FEASIBILITY ASSESSMENT — JUNE-AUGUST 2025

TEAMCIVX METHODOLOGY AND SCOPE

During Phase 1 — and throughout the entire process — TeamCivX will assume the role of project lead of all team members, working in partnership with True North Research to first conduct a reliable voter survey to help set your measure on the right path. We'll help ensure you are asking the right strategic questions, including:
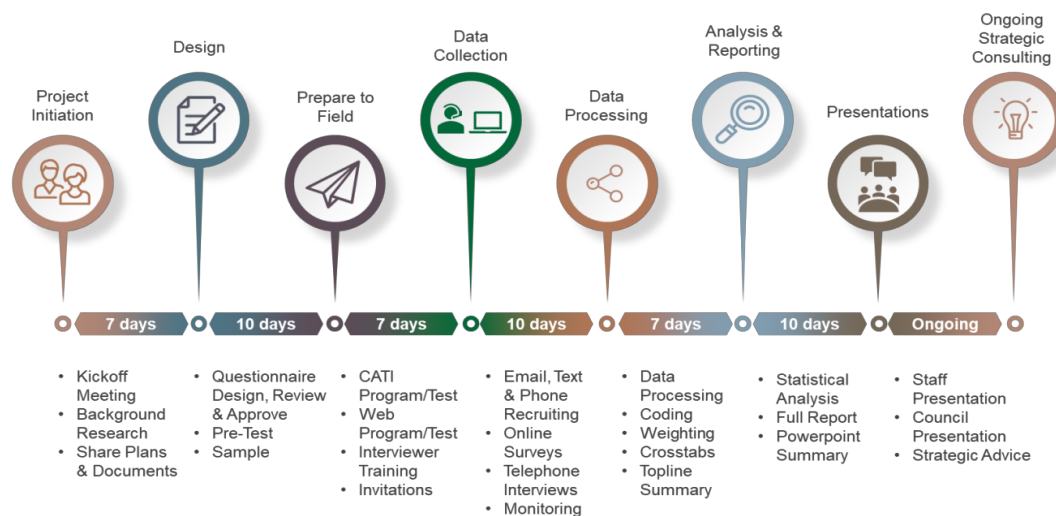
- Is a bond measure or parcel tax feasible?
- Does a measure stand a reasonable chance of achieving the 2/3 passage threshold? If not, what other options are available to us?
- What bond or parcel tax amount and rate fits within the tolerances of your community?
- What projects and facility improvements are the top priorities for your voters?
- Are there controversial projects that should be avoided?
- Does sufficient awareness of your infrastructure and funding needs exist or is additional informational outreach needed?
- When is the right time to go to the ballot? The next election? A future election?
- How does projected voter turnout in upcoming elections impact a bond or parcel tax proposal?
- What other competing measures or issues are on the horizon that could impact your measure?
- How does the economy and political environment impact your measure?

To help answer these questions, TeamCivX will conduct a thorough assessment of the local political landscape, analyze past election results, and work with True North to design a statistically reliable opinion survey of your local voters.

Our specific scope for this phase of work includes:

- Develop potential strategies to meet your funding needs to be tested in polling.
- Collaborate with True North, your financial advisor, legal counsel, all city working groups, and any other consultants to design, conduct, and analyze a revenue measure feasibility survey of voters.
- Conduct a demographic analysis of voters in your city to analyze how they break into key sub-groups by age, ethnicity, political party, length of residency, and other key criteria.
- Analyze past election results in your city and region to understand voter turnout trends and other relevant voting patterns.
- Research other local tax proposals and issues that may be heading to an upcoming ballot that could compete with your ballot measure.
- Make specific recommendations regarding the optimal election date, bond amount, tax rate, project priorities, and other important ballot measure features.

TRUE NORTH METHODOLOGY AND SCOPE

If the ultimate goal of this study is to enable the City to make sound, strategic decisions based upon the data that is collected, it is critical that the data be collected according to rigorous methodological standards. Indeed, although it may be easy to conduct a "survey", it is quite challenging to design and implement a survey that A) produces valid and reliable measures of the opinions and behaviors of interest, and B) produces data that is representative of the population of voters that is the focus of a study. Only by satisfying each of these conditions will the proposed study produce data that is trustworthy and thus a sound basis for making decisions.

Meeting the aforementioned conditions has become more difficult in recent years. Much has changed in terms of how voters receive information, the accessibility of voters through traditional recruiting methods, and their willingness to participate in community surveys. Caller-ID, SPAM filters, habitual call-screening, and busy lifestyles have made it more difficult to reach respondents in general, leading to lower response rates and greater response bias when relying on just one or two recruiting methods. In order to continue producing statistically reliable measures of their voters' opinions, priorities and behaviors, the research methodologies that cities employ for revenue measure surveys must adapt to these new challenges.

The methodology that we recommend in this section is designed to do just that — adapt to these challenges by employing innovative techniques that will ensure statistically reliable results. For San Carlos, we propose to use a **stratified & clustered random sampling** methodology that ensures a representative sample of San Carlos voters who are likely to participate in the elections of interest (e.g., November 2026). We also recommend using a **three-pronged recruiting strategy** of email invitations, text invitations, and telephone calls to recruit participation in the survey and a **mixed-method data collection methodology** that allows sampled respondents the flexibility of participating by telephone or online at a password-protected web site in their preferred language (English or Spanish). Designed, tested, and refined by True North over the past 15 years, our recommended survey approach has proven to increase participation rates, reduce response bias, better engage traditionally hard-to-reach subgroups, and increase the overall accuracy and reliability of revenue measure surveys.

The scope of services that we propose to perform for the City includes all tasks associated with designing, conducting, and analyzing the survey, as well as presenting the results. To accommodate the City's interest in exploring both a bond and a parcel tax, we recommend using a **split-sample approach** whereby half of the random sample (300) will receive a survey focused on a bond and the remaining half will receive a parcel tax version (300). This will provide a clean, apples-to-apples comparison of the two potential measures and avoid position-order bias that occurs when asking the same respondent about two possible revenue measures.

Briefly, the scope of services for the baseline survey (and optional tracking survey) includes:

- Meet with the City to thoroughly discuss the research objectives and methodology for the study, as well as discuss potential challenges, concerns, and issues that may surround the study.
- Develop a stratified and clustered random sample of voters who—based on their voting history and registration status — are likely to participate in the election of interest (November 2026, with June 2026 subset).
- Develop a draft questionnaire for the City's review and make revisions as needed until all parties approve of the instrument.
- Pre-test the survey instrument to ensure its integrity.
- Web program the finalized survey instrument to allow respondents to participate online at a secure, password-protected survey site.
- CATI (Computer Assisted Telephone Interviewing) program the same survey instrument to ensure accurate and reliable data collection for respondents who prefer to participate by telephone.
- Professionally translate the survey into Spanish.
- Recruit voters to participate in the survey using a combination of email, text, and telephone calls.
- Complete at least 600 quality interviews (300 per version) according to the sampling plan and a strict interviewing protocol. A sample of this size will produce survey estimates that more than meet the academic standard for statistical reliability (+/- 4% at the 95% confidence level).
- Process the data, which includes conducting validity checks, cleaning, recoding, coding open-end responses, and adjusting for strategic oversampling (if used) through a statistical procedure known as "weighting".
- Prepare an initial topline report that presents the overall findings of the survey.
- Prepare a thorough report on the findings, including a detailed question-by-question analysis, description of the methodology, an executive summary of the key findings and conclusions/recommendations, as well as graphics showing how the answers varied by subgroups of voters. The report will include extensive full-color graphics displaying the findings, as well as an insightful narrative discussion of the results and their implications.
- Prepare an electronic copy of the final report to allow the City to reproduce the report as needed.
- Prepare a PowerPoint presentation of the results and present the results to the City.
- Be available to assist and provide advice to the City after the survey is complete.

PHASE 2: AWARENESS BUILDING — SEPTEMBER 2025-MARCH 2026

If polling indicates a path forward for a revenue measure, our next step is to develop and implement an informational communications plan to raise awareness of your infrastructure and funding needs, while also introducing your proposed measure and providing opportunities for community input. While cities and public agencies are legally prohibited from advocating for the passage of a measure, you can educate and inform your community about your needs and plans.

We would recommend a robust public outreach and engagement process in late 2025 and early 2026, built around multiple "communication waves" featuring direct mail, digital, social media, and email content. We also recommend significant stakeholder outreach to dovetail with these broad, paid communication efforts, to ensure you are educating key members of your community and soliciting their feedback one-on-one. We will advise you on which local leaders, elected officials, business organizations, and community groups to engage with (and how best to engage with them).

Specifically, our scope will include the following components:
- Develop informational messaging and fact sheets to be distributed at city and community functions.
- Provide content related to your funding needs and proposed measure to be added to the City's website, used in social media, and included in email updates and newsletters.
- Prepare PowerPoint presentations for public and community meetings.
- Write, design, and produce mailings and advertising to inform local residents.
- Develop strategies and plans to inform internal stakeholder groups.
- Develop strategies and plans to inform external groups including elected leaders, business leaders, ethnic community leaders, faith community leaders, taxpayer groups, and others.

TeamCivX will write all copy, handle the graphic design, coordinate printing and mailing, and place any ad buys as needed. We will just need for you to review content and designs and make sure the information is accurate and has the right feel for your community. We will also need to coordinate with those who manage the City's various social media accounts.

PHASE 3: MEASURE DEVELOPMENT — APRIL 2026-AUGUST 2026

The deadline to qualify for the November 2026 ballot is August 7, 2026, but we'll want to be prepared with final measure language, tax rates, and other key details well before that. By beginning that work in the spring of 2026, we'll ensure that your City Council has all of the details and requisite documentation to qualify for the ballot well before the August deadline.

In order to ensure that we are grounding all final decision-making in solid, quantifiable data, True North will conduct a tracking survey to gauge voters' opinions regarding the measure and help fine-tune measure components. The survey will allow us to track support over time within the community and determine if the measure is election-ready. Based on the results of the feasibility assessment, community input received during the awareness-building efforts and the results of the tracking survey, we will have what we need to help you finalize your measure for the ballot. We'll ensure that it is closely aligned with the community's priorities and has the best chance for success. We will work closely with your financial advisor, legal counsel, and other experts to accomplish this work, including:
- Recommend a final bond or parcel tax amount, tax rate, and other specifics.
- Refine the final project list to reflect community priorities and ensure projects are described in clear language the general public will understand.
- Work with legal counsel to develop the 75-word ballot question.
- Work with legal counsel to develop and refine all language that will appear in the ballot pamphlets mailed to all voters.
- Present recommendations, documents, resolutions, and ordinances to the City Council for approval.
- Work with local elections officials to ensure your measure qualifies for the ballot.

With these steps complete, your measure will be on the ballot. Since cities cannot advocate for ballot measures, an independent campaign committee will need to be formed to run an advocacy campaign in support of the measure. TeamCivX provides campaign consulting services to independent campaign committees, but those services are not part of this proposal since the campaign must be led by an independent group.

REFERENCES

CITY OF SAN MATEO — ALEX KHOJIKIAN, CITY MANAGER

(714) 308-6400, alexkhojikian@gmail.com

TeamCivX and True North partnered with the City of San Mateo to help pass a key amendment to its General Plan in 2024, as well as a transient occupancy tax (2020) and a real property transfer tax (2022). For the most recent measure, we surveyed voters to gauge support and align the amendment's goals with community priorities, then equipped City officials with the tools and messaging needed to engage effectively. A robust communications plan was developed and implemented, leading to a broad coalition of support. City officials met with over a hundred leaders and community organizations to bring them along throughout the process. We also worked previously with Alex in Redwood City on a successful sales tax measure, during his time there as Assistant City Manager.

CITY OF SAN BRUNO — NICK PEGUEROS, CHIEF FINANCIAL OFFICER

(650) 410-0538, npegueros@sanbruno.ca.gov

Facing aging infrastructure and over $500 million in estimated needed repairs, the City of San Bruno turned to TeamCivX for assistance. TeamCivX guided the City through the process of placing Measure Q, a $102 million bond, on the ballot. Working closely with City officials, a comprehensive communications strategy was developed and executed to engage residents and build a compelling narrative around the need for funding. On Election Day, Measure Q passed with 73% support.

CITY OF BURLINGAME — DONNA COLSON, COUNCILMEMBER

(650) 678-0952, d.colson@comcast.net

The partners at TeamCivX have worked with Donna for more than a decade on many successful bonds, parcel taxes, sales taxes, and business licenses taxes for both Burlingame School District and the City of Burlingame. Most recently, the City of Burlingame partnered with the TeamCivX team to address ongoing funding needs. In 2022, the City placed Measure X, a business license tax, on the ballot. With support from TeamCivX, the measure passed with 75% of the vote, generating an additional $2.5 million annually. TeamCivX assisted in assessing the feasibility of the measure, communicating the measure to the community, and placing the measure on the ballot.

REDWOOD CITY SCHOOL DISTRICT — JOHN BAKER, SUPERINTENDENT

(650) 482-2230, jbaker@rcsdk8.net

TeamCivX partners have worked with John on multiple successful bonds and parcel taxes for Redwood City School District. In 2022, the Redwood City School District placed Measure S, a $298 million bond. on the ballot. The TeamCivX partners assisted the District in their feasibility assessment, communications, and outreach culminating in Measure S passing with 60% of residents voting in favor.

BELMONT-REDWOOD SHORES SCHOOL DISTRICT — DAN DEGUARA, SUPERINTENDENT

(650) 620-2703, ddeguara@brssd.org

Dan and TeamCivX have a long track record of successful bond and parcel tax measures for Belmont-Redwood Shores schools. This past November, TeamCivX worked with the Belmont-Redwood Shores School District to place a parcel tax on the ballot. After executing the designed communications and outreach strategy, the parcel tax passed with 67% approval.

BURLINGAME SCHOOL DISTRICT — MARLA SILVERSMITH, SUPERINTENDENT

(650) 259-3828, msilversmith@burlingameschools.org

The Burlingame School District placed Measure GG, a parcel tax, on the ballot this past November. The District worked with TeamCivX to assess the measure's feasibility, conduct outreach to the community, and deploy a communications strategy. On Election Day, Measure GG passed with 74% support.

SAN CARLOS SCHOOL DISTRICT — RALPH CRAME, CHIEF FINANCIAL OFFICER

(650) 922-9466, rcrame@gmail.com

Our work with Ralph was during his time at Millbrae School District, partnering on many successful bonds and parcel taxes. Most recently, we helped the Millbrae School District place and pass Measure J, a $95 million bond, on the November 2024 ballot. This followed the successful passage of Measure A, a parcel tax approved during a special election in 2023. Measure J passed with 64% support, and Measure A passed with 71%.

SEQUOIA UNION HIGH SCHOOL DISTRICT — CRYSTAL LEACH, ASSOCIATE SUPERINTENDENT OF ADMINISTRATIVE SERVCES

(650) 369-1411, cleach@seq.org

TeamCivX and True North provided baseline and tracking research, strategy, and communications for Sequoia Union High School District's successful $591 bond on the November 2022 ballot, Measure W.

OFFICE OF SUPERVISOR LISA GAUTHIER — MARCI DRAGUN, CHIEF OF STAFF

(650) 599-1021, mdragun@smcgov.org

Marci has worked with TeamCivX partners on multiple countywide efforts, including the Measure K campaign for afforable housing in 2016 and the SMCStrong efforts in the wake of the Covid-19 pandemic.

SAMCEDA — ROSANNE FOUST, PRESIDENT

(650) 413-5600 ext. 1, rfoust@samceda.org

Rosanne has worked with TeamCivX partners on multiple countywide efforts, including the aforemetnioned Measure K, Measure W for SamTrans, and Measure RR for Caltrain.

MODIFICATIONS TO SCOPE OF WORK

We do not propose any modifications to the scope of work.

FEE PROPOSAL

TEAMCIVX PRICING

As is the standard in our industry, TeamCivX contracts on a monthly fee basis during the period of our engagement. For a city the size of San Carlos, our monthly consulting fee is $7,500.

Our fee will not change regardless of how many times you need us on the phone, via email, or in-person. TeamCivX doesn't want you to hesitate to call when you need us. Jeremy will be your primary point of contact and available to chat seven days a week.

If polling indicates a viable path forward, we often recommend a supplemental budget for informational direct mail. We estimate an informational mailer to all approximately 21,000 registered voters to cost between $16,500-$21,000, depending on the exact specifications.

As part of our contract, we will assist San Carlos in utilizing all free media and current online resources to provide information to the public and supplementing direct mail communications with coordinated digital content. In addition, the City may wish to allocate additional resources to paid Facebook or Digital Advertising. Digital pricing varies based on the size, scope, and duration of the program and is priced separately.

TRUE NORTH PRICING

The cost for True North Research to conduct a start-to-finish survey research project with a sample size of at least 600 completed interviews using a split-sample approach to test a bond and parcel tax, including research design, questionnaire drafting, sample acquisition, Spanish translation, data collection, data processing, analysis of results, and preparation of reports, memos, or presentations as needed, is $33,500.

If needed, a tracking survey could be completed for $28,500, assuming the tracking survey is focused on one type of measure at this point (bond or parcel tax). This fee is all inclusive of all tasks and deliverables, with the exception of travel-related expenses (if needed).

NOT-TO-EXCEED AMOUNT

At this stage in the process, without polling to indicate the likelihood of success and the informational communication strategies needed, providing a not-to-exceed amount is a bit difficult. That being said, if we were to err on the side of caution, we would plan on a fully-fledged communications, outreach and stakeholder engagement plan, including two polls and utilizing the entire calendar available to us. Under that scenario — which would include four mailers, digital advertising, two polls, and work running from June 2025-August 2026 — $275,000 would be a relatively conservative not-to-exceed amount.

However, if cost is a concern, we could absolutely develop a plan that could work within your budget. On a slightly shorter timeline, with fewer mail pieces, no paid digital content, and without a tracking poll, we could complete the above work for $150,000.

Bottom line: we will work with you on a plan and budget that feels comfortable for you, while ensuring we maximize our chances for success.

ACKNOWLEDGMENT OF CITY'S
STANDARD PROFESSIONAL AGREEMENT

The City's standard professional services agreement is acceptable as written. We will provide the necessary insurance and other documentation as required, should we be chosen to lead this effort.

SIGNED & COMPLETED LEVINE ACT DISCLOSURE

See attached.

California Levine Act Statement

California Government Code Section 84308, commonly referred to as the "Levine Act," prohibits any San Carlos City Council Member from participating in any action related to a contract or application if they receive any political contributions from the business or applicant totaling more than $500 within the previous twelve months, and for twelve months following the date of a final decision.

The Levine Act also requires a member of the San Carlos City Council who has received such a contribution to disclose the contribution on the record of the proceeding.

Current San Carlos City Council Members are listed at: www.cityofsancarlos.org/CityCouncil. Proposers are responsible for accessing this link to review the names prior to answering the following questions:

1. Have you or your company, or any agent on behalf of you or your company, made any political contributions of more than $500 to any San Carlos City Council Member in the 12 months preceding the date of the submission of your proposal or application, or the anticipated date of any Council action?

    ☐ Yes. List Council Member(s): _____
    ☒ No

2. Do you or your company, or any agency on behalf of you or your company, anticipate or plan to make any political contribution of more than $500 to any San Carlos City Council Member in the 12 months following any Council action related to your proposal or application?

    ☐ Yes. List Council Member(s): _____
    ☒ No

Answering yes to either of the two questions above does not preclude the San Carlos City Council from awarding a contract or approving an application or any subsequent action. It does however, preclude the identified Council Member(s) from participating in any actions related to your proposal or application.

4/28/2025
_____
Date

Jeremy Hauser
_____
Signature of authorized individual

TeamCivX
_____
Company/Applicant Name

Updated 1.1.25

Statewide Measures

Proposition 1 - Veterans and Affordable Housing Act
Proposition 2 - Homeless Mental Health Housing Act

Unified School Districts

Alameda USD
Albany USD
Amador County USD
Arcadia USD
Azusa USD
Baldwin Park USD
Bassett USD
Beaumont USD
Brea Olinda USD
Cabrillo USD
Capistrano USD
Carlsbad USD
Castro Valley USD
Charter Oak USD
Claremont USD
Conejo Valley USD
Corona-Norco USD
Cotati-Rohnert Park USD
Culver City USD
Davis Joint USD
Downey USD
Dublin USD
El Rancho USD
Fairfield-Suisun USD
Folsom Cordova USD
Fremont USD
Garden Grove USD
Glendale USD
Hayward USD
Irvine USD
Jurupa USD
Kerman USD
La Cañada USD
Lake Elsinore USD
Lammersville USD
Las Virgenes USD
Lompoc USD
Long Beach USD
Los Alamitos USD
Los Angeles USD
Madera USD
Manhattan Beach USD
Manteca Unified USD
Martinez USD
Milpitas USD
Monterey Peninsula USD
Moorpark USD
Moreno Valley USD
Morgan Hill USD
Morongo USD
Mount Diablo USD
Mountain Empire USD

Napa Valley USD
Newark USD
New Haven USD
Novato USD
Oak Park USD
Orange USD
Pajaro Valley USD
Palo Alto USD
Palos Verdes Peninsula USD
Paradise USD
Patterson Joint USD
Pleasanton USD
Poway USD
Riverside USD
Sacramento City USD
Saddleback Valley USD
San Jose USD
San Lorenzo Valley USD
San Marcos USD
San Marino USD
San Ramon Valley USD
Santa Ana USD
Santa Monica-Malibu USD
Simi Valley USD
Snowline Joint USD
Sonoma Valley USD
South Pasadena USD
South San Francisco USD
Tahoe Truckee USD
Tustin USD
Ukiah USD
Val Verde USD
Vallejo City USD
Vista USD
Walnut Valley USD
Washington USD
Westa Contra Costa USD
Woodland Joint USD
Yucaipa-Calimesa Joint USD

Elementary School Districts

Alisal Union SD
Alpine Union SD
Alta Loma SD
Alum Rock Union Elementary SD
Anahiem Elementary SD
Auburn Union SD
Beardsley SD
Belmont-Redwood Shores SD
Berryessa Union SD
Bonsall SD
Buena Park SD
Burlingame SD
Cambrian SD
Campbell Union SD
Castaic Union SD
Central SD
Centralia Elementary SD
Cupertino Union SD
Del Mar Union SD
Miller Creek SD

Fountain Valley SD
Franklin-McKinley SD
Fruitvale SD
Fullerton SD
Huntington Beach City SD
Jefferson Elementary SD
Kentfield SD
La Mesa-Spring Valley Union SD
Lakeside Union SD
Larkspur-Corte Madera SD
Live Oak SD
Loma Prieta Joint Union SD
Los Altos SD
Los Gatos Union SD
Lowell Joint SD
Menifee Union SD
Millbrae SD
Modesto City Elementary SD
Moraga SD
Moreland SD
Mountain View Whisman SD
Norris SD
North Sacramento SD
Oakley Union Elementary SD
Ocean View SD
Orinda Union SD
Pacifica SD
Palmdale SD
Perris Elementary SD
Petaluma City Elementary SD
Portola Valley SD
Ravenswood City SD
Redwood City SD
Reed Union SD
Romoland SD
Rosemead SD
Roseville City SD
San Carlos SD
San Mateo-Foster City SD
San Rafael Elementary SD
Santa Cruz City Elementary SD
Santa Rita Union SD
Santa Rosa Elementary SD
Saratoga Union SD
Saugus Union SD
Savanna SD
Soquel Union Elementary SD
Sulphur Springs Union SD
Union SD
Victor Elementary SD
Westminster SD

High School Districts

Campbell Union HSD
Chaffey Joint Union HSD
Delano Joint Union HSD
East Side Union HSD
El Dorado Union HSD
Fullerton Joint Union HSD
Galt Joint Union HSD

Jefferson Union HSD
Los Gatos-Saratoga Union HSD
Mountain View-Los Altos HSD
Nevada Joint Union HSD
Oxnard Union HSD
Perris Union HSD
Petaluma Joint Union HSD
Placer Union HSD
Roseville Joint Union HSD
San Benito HSD
San Dieguito Union HSD
San Mateo Union HSD
San Rafael HSD
Santa Cruz City HSD
Santa Rosa HSD
Sequoia Union HSD
Tamalpais Union HSD
William S. Hart Union HSD

Community College Districts

Allan Hancock College
Antelope Valley College
Cabrillo College
Chabot-Las Positas CCD
Chaffey College
College of the Canyons
College of Marin
College of the Siskiyous
Contra Costa CCD
Foothill-De Anza CCD
Gavilan College
Glendale College
Hartnell College
Lane Community College
Mendocino College
Merced CCD
MiraCosta College
Monterey Peninsula College
Napa Valley College
Pasadena City College
Peralta CCD
Mt. San Jacinto CCD
Rancho Santiago CCD
Riverside CCD
San Bernardino CCD
San Joaquin Delta CCD
Santa Barbara City College
Santa Monica College
Santa Rosa Junior College
Yuba College

Hospitals and Healthcare

Salinas Valley Memorial Healthcare System
Seton Medical Center
Valley Health System*

*private-side campaign only

Cities and Counties 🏛

LA County Homeless
Marin County
Napa County
Placer County
San Mateo County
Santa Clara County
Santa Cruz County
Solano County
Sonoma County
City of Adelanto
City of Alameda
City of Barstow
City of Beverly Hills
City of Burlingame
City of Campbell
City of Chula Vista
Town of Corte Madera
City of Crescent City
City of Del Mar
City of Diamond Bar
City of Downey
City of Emeryville
City of Fairfield
City of Foster City
City of Fullerton
City of Glendale
City of Gustine
City of Kerman
City of Lancaster
City of Lafayette
City of Laguna Beach
City of La Verne
City of Lomita
City of Los Altos
City of Madera
City of Merced
City of Montebello
City of Morgan Hill
City of Murrieta
City of Napa
City of Oceanside
City of Ontario
Town of Orinda
City of Pacifica
City of Palm Springs
City of Palmdale
City of Palo Alto
City of Paramount
City of Pleasant Hill
City of Pomona
City of Redlands
City of Redwood City
City of Salinas
Town of San Anselmo
City of San Bernardino
City of San Mateo

City of San Jose
City of San Rafael
City of Santa Cruz
City of Santa Fe
   Springs
City of Santa Monica
City of Santa Rosa
City of South Lake
   Tahoe
City of South Pasadena
City of Suisun City
Town of Truckee
City of Union City
City of Vacaville
City of Ventura
City of Watsonville
City of Whittier
Town of Windsor

Transportation 🚆

BART (Santa Clara County)*
Caltrain*
Contra Costa County Transportation Authority*
Fresno County Transportation Authority*
Merced County Association of Governments
Metropolitan Transportation Commission*
Monterey-Salinas Transit
Napa County Transportation Agency
Placer County
Riverside County Transportation Commission
San Mateo County Transit District
Santa Cruz County Regional Transportation
   Commission
Sonoma County Transportation Authority*
Stanislaus County Transportation*
Transportation Agency of Monterey County*
Transportation Authority of Marin*
Truckee/North Tahoe Transportation Agency
*private-side campaign only

Parks, Open Space and Water Districts 🌲

Alameda County Clean Water Program
Desert Recreation District
East Bay Regional Parks District
Greater Vallejo Recreation District
Hayward Area Recreation District
Los Angeles County Flood Control District
Los Angeles County Regional Park and Open
   Space District
Marin County Parks/MALT*
Midpeninsula Regional Open Space District
Monterey Peninsula Regional Park District
Napa County Regional Park and Open Space
   District/Napa Land Trust*
Peninsula Open Space Trust
Santa Clara Valley Open Space Authority
Santa Clara County Parks
Santa Clara Valley Water District
San Francisco Bay Restoration Authority*
Sonoma County Agricultural Presevation and
   Open Space District
*private-side campaign only

Fire Districts 🚒

Crescent Fire Protection District
East Contra Costa Fire Protection District
Fresno County Fire Protection District
Los Angeles County Fire
Marin County Fire Department
Northstar Fire
North Tahoe Fire Protection District
Santa Cruz County Fire District CSA48
Truckee Fire Protection District

Libraries 📖

Garfield County Public Libraries
Los Altos Library
Marin County Free Library
Pacifica Library
Santa Cruz County Library
South Pasadena Library
Whittier Library

Elected Officials ✓

Dave Pine, Chair, San Mateo County
   Board of Supervisors
Belia Ramos, Chair, Napa County Board of
   Supervisors
Anne Cottrell, Napa County Board of Supervisors
Diane Dillon, Napa County Board of Supervisors
   (retired)
Brad Wagenknecht, Napa County
   Board of Supervisors (retired)
Tom Bates, Mayor of Berkeley (retired)
Judy Chirco, San Jose City Council (retired)
Linda LeZotte, San Jose City Council (retired)
Pam Foley, San Jose City Council
Peter Ortiz, San Jose City Council
Mary Luros, Napa City Council
Beth Painter, Napa City Council
David Oro, American Canyon City Council
Jeff Dodd, Napa Valley CCD Board of Trustees

CALIFORNIA MUNICIPALITIES

Agoura Hills	Cypress	Lake Elsinore	Rocklin
Alhambra	Dana Point	Lake Forest	San Anselmo
Aliso Viejo	Del Mar	Lathrop	San Carlos
Anaheim	Diamond Bar	Lemon Grove	San Clemente
Apple Valley	East Palo Alto	Lompoc	San Diego
Arroyo Grande	Eastvale	Long Beach	San Dimas
Atascadero	El Cajon	Los Angeles	San Gabriel
Atherton	Encinitas	Los Gatos	San Jose
Azusa	Escondido	Madera	San Luis Obispo
Baldwin Park	Folsom	Malibu	San Marcos
Banning	Fontana	Manhattan Beach	San Marino
Barstow	Fremont	Menifee	San Mateo
Belvedere	Gilroy	Mission Viejo	Santa Barbara
Beverly Hills	Glendale	Modesto	Santa Clarita
Big Bear Lake	Glendora	Moorpark	Santa Monica
Brea	Goleta	Murrieta	Signal Hill
Buellton	Grand Terrace	Norwalk	Solana Beach
Buena Park	Half Moon Bay	Oceanside	South Lake Tahoe
Burbank	Hemet	Oxnard	South Pasadena
Campbell	Hesperia	Palmdale	Temecula
Carlsbad	Huntington Beach	Petaluma	Thousand Oaks
Cerritos	Indian Wells	Pico Rivera	Truckee
Chino	Irvine	Placentia	Upland
Chula Vista	Kerman	Port Hueneme	Ventura
Claremont	La Canada-Flintridge	Rancho Cucamonga	Watsonville
Clayton	La Mesa	Rancho Palos Verdes	West Hollywood
Commerce	La Palma	Rancho Santa Margarita	Westlake Village
Coronado	La Verne	Redlands	Whittier
Costa Mesa	Laguna Beach	Redondo Beach	Yorba Linda
Cudahy	Laguna Niguel	Riverside	Yucca Valley

CALIFORNIA EDUCATION

ABC USD	El Segundo USD	Monterey Peninsula College	San Gabriel USD
Acalanes HSD	Escondido SD	Monrovia USD	San Jacinto USD
Albany SD	Fairfax SD	Moraga SD	San Leandro USD
Alta Loma SD	Fallbrook UHSD	Moreno Valley USD	San Marcos USD
Alvord USD	Fountain Valley SD	Mother Lode SD	San Marino USD
Anaheim SD	Fowler SD	Mountain Empire USD	Santa Ana USD
Anaheim UHSD	Fruitvale SD	Mountain View SD	Santa Barbara CCD
Antelope Valley UHSD	Fullerton JUHSD	Murrieta Valley USD	Santa Clara USD
Apple Valley USD	Garden Grove USD	Napa Valley USD	Santa Cruz City SD
Arvin SD	Gavilan CCD	Newhall SD	Santa Cruz City HSD
Baldwin Park USD	Glendale USD	Newport-Mesa USD	Santa Maria Bonita SD
Banning USD	Greenfield Union SD	Nuview Union SD	Santa Maria UHSD
Beardsley SD	Grossmont Cuyamaca CCD	Oak Park USD	Santa Paula USD
Beaumont USD	Grossmont HSD	Oakland USD	Saugus USD
Bellflower USD	Irvine USD	Ocean View SD	Savanna SD
Bonsall USD	Julian UHSD	Orange USD	Scotts Valley USD
Brea-Olinda USD	Kerman USD	Palomar CCD	Sequoia UHSD
Buena Park SD	La Canada USD	Palos Verdes Peninsula USD	Soka University
Burbank USD	La Habra City SD	Panama-Buena Vista USD	Solana Beach SD
Cambrian SD	La Mesa-Spring Valley SD	Paramount USD	South Pasadena USD
Campbell UHSD	Lafayette SD	Pasadena CCD	Standard SD
Capistrano USD	Lake Elsinore USD	Pasadena USD	Sweetwater UHSD
Carlsbad USD	Lakeside SD	Perris SD	Tahoe-Truckee USD
Centralia SD	Lancaster USD	Perris UHSD	Temecula Valley USD
Charter Oak USD	Larkspur-Corte Madera SD	Piedmont USD	Torrance USD
Claremont USD	Las Virgenes USD	Poway USD	Tracy USD
College SD	Liberty HSD	Rancho Santiago CCD	Travis USD
College of the Desert	Little Lake City SD	Rim of the World USD	Tustin USD
Colton Joint USD	Livermore Valley USD	Rio Bravo-Greeley Union SD	UCLA
Compton USD	Lompoc USD	Riverside CCD	Union SD
Coronado USD	Los Alamitos USD	Riverside USD	Val Verde USD
Corona-Norco USD	Los Banos USD	Romoland SD	Victor SD
Covina Valley USD	Lowell Joint SD	Rosedale SD	Vista USD
Culver City USD	Lucia Mar USD	Sacramento City USD	Walnut Valley USD
Del Mar SD	Lynwood USD	Sacramento State University	Washington SD
Desert Sands USD	Manhattan Beach USD	Saddleback Valley USD	West Covina USD
Downey USD	Martinez USD	Salinas UHSD	Willits USD
Eastside Union SD	Menifee SD	San Bernardino CCD	Yosemite CCD
East Whittier City SD	Merced CCD	San Bruno Park SD	
Elk Grove USD	MiraCosta CCD	San Dieguito UHSD	

TRUE NORTH RESEARCH CLIENTS

FEDERAL, STATE, COUNTY & SPECIAL DISTRICT

Alameda Hospital
Antelope Valley Hospital
Bay Area Air Quality Management District
Bay Area Open Space Council
Bay Area Rapid Transit
Bear Mountain Recreation and Park District
Bear Valley Healthcare District
Big Bear Fire Authority
California Air Resources Board
California Department of Public Health
California Joint Powers Insurance Authority
California Office of Traffic Safety
Caltrans
Carpinteria-Summerland Fire Protection District
Casitas Municipal Water District
Centers for Disease Control & Prevention (CDC)
Conejo Recreation and Park District
Contra Costa Clean Water Program
Contra Costa County Fire Protection District
Contra Costa County
Costa Mesa Sanitary District
Cucamonga Valley Water District
East Contra Costa Fire Protection District
East Valley Water District
Eden Health
El Dorado Hills Community Services District
Elsinore Valley Municipal Water District
Fair Oaks Recreation and Park District
Feather River Recreation and Park District
Foothill Transit
Fresno Area Express
Fresno County
Goleta West Sanitary District
Healdsburg District Hospital
I-15 Interregional Partnership
Imperial County Transportation Commission
Kaweah Delta Healthcare District
Kern Valley Healthcare District
Los Angeles Metro Authority
Madera County Transportation Authority
Marin County

Marin General Hospital
MarinHealth
Mesa Water
Metropolitan Transit System
Metropolitan Transportation Commission
Mission Oaks Recreation and Park District
Monte Vista Water District
Monterey Peninsula Regional Park and Recreation District
Mountains Recreation and Conservation Authority
Mountains Restoration Trust
Nevada County
New Mexico Department of Public Health
New York State Department of Transportation
Nipomo Community Services District
North County Transit District
North Kern-South Tulare Hospital District
North Sonoma County Healthcare District
North Tahoe Public Utility District
Novato Sanitary District
Oak Valley Hospital
Olivenhain Municipal Water District
Orange County Council of Governments
Orange County Fire Authority
Orange County Transportation Authority
Otay Water District
Palomar Health
Petaluma Healthcare District
Placentia Library District
Placer County
Pleasant Hill Recreation & Park District
Pleasant Valley Recreation & Park District
Plumas Healthcare District
Port of Long Beach
Port of San Diego
Rancho Murieta CSD
Rancho Simi Park and Recreation District
Roaring Fork Transportation Authority
Rodeo-Hercules Fire Protection District
Sacramento Area Council of Governments
Sacramento Metropolitan Air Quality Management District
Sacramento Municipal Utility District

Salinas Valley Memorial Hospital
SamTrans
San Benito Healthcare District
San Bernardino County
San Diego Association of Governments
San Diego County
San Diego County Water Authority
San Diego Unified Port District
San Diego Workforce Partnership
San Gorgonio Health Care District
San Joaquin Valley Air Quality Management District
San Jose International Airport
San Juan Water District
San Luis Obispo Council of Governments
San Mateo County
San Mateo County Parks and Recreation Foundation
Santa Barbara County
Santa Barbara County Association of Governments
Santa Clara County Housing Authority
Santa Clara Valley Open Space Authority
Santa Clarita Valley Water Agency
Santa Margarita Water District
Santa Monica Mountains Conservancy
Seneca Healthcare District
Solano Open Space Coalition
Southern California Association of Governments
SR-91 Interregional Partnership
State of California
Tahoe Forest Hospital District
Tri-City Hospital District
Truckee-Donner Recreation and Park District
Truckee Fire Protection District
Truckee Regional Library
Trust for Public Lands
Washington Hospital
West Basin Municipal Water District
West Valley Water District
Western Riverside Council of Governments
Valley Transportation Authority
Ventura County
Yuba Water