CITY COUNCIL ACTION FORM

DEPARTMENT	PRESENTED BY	DATE
Administration	Drew Nelson - City Administrator	December 6, 2022

ITEM
Approval of a proposal of Opinion Research Services from Magellan Strategies

BACKGROUND
Staff reached out to Magellan Strategies, a public opinion research firm specializing in measuring and understanding resident and voter opinion, after the most recent election. There are two objectives for the survey project. The first is to measure and understand why Salida voters supported or opposed ballot measures 2A, 2B, 2D and 6A. The second objective is to educate and inform voters about having a Home Rule form of government, the process to get there, and measure support and opposition levels. The proposal identifies opportunities to conduct either one or two surveys, based on the number of questions being asked. Surveys would be conducted via text, telephone and potentially email.

FISCAL NOTE

The cost of the surveys is between $16,000 and $35,000, depending on whether or not there are one or two separate surveys. The final cost will be determined once the questions have been formulated.

STAFF RECOMMENDATION

In order to accurately gauge the community's interest and support of various funding mechanisms and begin an education campaign regarding Home Rule status, staff recommends moving forward with a professional firm. This will allow staff to negotiate the final agreement with Magellan Strategies to conduct public opinion research.

SUGGESTED MOTION

A Councilmember should state, "I move to combine and approve the Consent Agenda", followed by a second and a roll call vote.

Proposal of Opinion Research Services to the City of Salida

November 22, 2022

Prepared for City Administrator Drew Nelson
Prepared by David Flaherty and Craig Haverback

About Magellan Strategies

Magellan Strategies is a public opinion research firm specializing in measuring and understanding resident and voter opinion. We have conducted research projects for Colorado local governments, school districts, special districts (metro, water, library, fire, recreation), and public policy groups since 2007. We are proud members and supporters of the Colorado City and County Managers Association (CCCMA) and the Colorado Municipal League (CML).

Our team has years of experience managing ballot measure research projects and post-election surveys to understand why voters supported or opposed a local ballot measure. In addition, we have managed four Home Rule survey projects for the Towns of Eagle, Erie, Monument, and the City of Castle Pines. Our firm also managed the City of Salida's 2022 Community Survey earlier this year. We appreciate the opportunity to submit this proposal for voter opinion research services to City Administrator Drew Nelson and the City of Salida.

City of Salida Voter Opinion Survey Project Needs

The City of Salida wishes to field a statistically accurate and demographically representative survey of voters. There are two objectives for this survey project. The first is to measure and understand why Salida voters supported or opposed ballot measures 2A, 2B, 2D, and 6A. The second objective is to educate and inform voters about having a Home Rule form of government, the process to get there, and measure support and opposition levels. However, there is a chance two surveys may be needed rather than one. This is due to the need for several Home Rule questions to educate voters about the process thoroughly.

The Strengths of MMS Text Survey Data Collection

For this project, we would utilize Multimedia Messaging Service (MMS) Text, telephone, and, if available, City of Salida email data collection methods to interview respondents. One aspect of a statistically valid and demographically representative survey is providing respondents with multiple opportunities to participate. MMS Text survey data collection meets that standard very well, which is why we have utilized it in our opinion research projects since 2020. It works by sending an MMS text survey invitation to a respondent's cell phone number. Additional benefits of MMS text survey data collection are:

1. **Respondent Engagement** – People from different demographic, ethnic, and socio-economic backgrounds are more likely to participate in a survey when the invitation includes their city's logo. This results in higher survey response rates compared to phone-only data collection.

2. **Larger Sample Sizes** – Stronger participation leads to larger sample sizes. Larger survey sample sizes have lower margins of error and higher confidence levels and produce a more accurate and statistically representative survey.

3. **More Affordable Than a Phone or Mail Survey** – The cost to send an MMS text survey invitation is significantly less than paying a call center $40 to $50 for a single cell phone interview. This allows us to pass cost savings on to our clients.

4. **Online/Text Invitation Survey Can Have More Questions** – It takes less time for a respondent to read and answer questions on a cellphone or electronic device than listening to an interviewer read questions and record responses.

5. **A Professional and Friendly Communication from Your Local Government** – An MMS text survey invitation from your local government is a professional and trustworthy communication that residents and respondents appreciate and trust. Moreover, it strengthens and enhances the local government's brand and image.
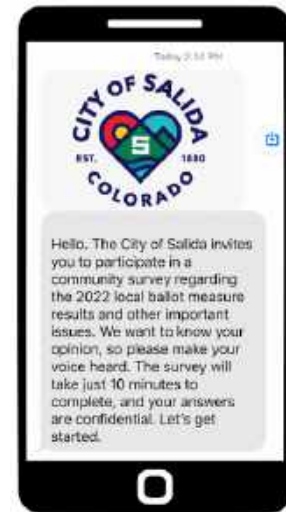
Participate in the Town of Erie Home Rule Ballot Measure Survey

As a proof of concept of the MMS text invitation experience, we encourage you to participate in a community survey we conducted for the Town of Erie this year for a Home Rule ballot measure. To experience the survey, click the link below or hover your cell phone over the survey QR code.

https://bit.ly/3yMYJDU

We Recommend a Limited Number of Senior Phone Interviews

As we mentioned earlier, a statistically valid survey gives respondents several ways of participating and taking the survey. For this survey project, we suggest interviewing a small sample of 35 to 50 senior voters aged 65 or older.

The primary reason being this population subgroup may be a little less likely to participate in the survey using a cell phone or electronic device. However, if the unweighted survey sample contains enough seniors, phone interviews may not be needed.

City of Salida Voter Demographics and Past Turnout Report

Following is our City of Salida voter registration and past election turnout data report. For this project, we would weigh the survey response data to be representative of the City's population.

Magellan Strategies City of Salida General Election Survey Demographics

Total Registration and Voter Turnout

Muni	Total Reg.		Nov. 2022		Nov. 2021		Nov. 2020		Nov. 2019	
Ward 1	1,775	34.7%	1,258	36.0%	975	37.8%	1,409	35.4%	950	37.5%
Ward 2	1,722	33.7%	1,196	34.2%	885	34.3%	1,341	33.7%	859	33.9%
Ward 3	1,620	31.7%	1,044	29.8%	722	28.0%	1,228	30.9%	723	28.6%
	5,117		3,498		2,582		3,978		2,532	
Sex	**Total Reg.**		**Nov. 2022**		**Nov. 2021**		**Nov. 2020**		**Nov. 2019**	
Female	2,640	51.6%	1,856	53.1%	1,372	53.1%	2,077	52.2%	1,351	53.4%
Male	2,477	48.4%	1,642	46.9%	1,210	46.9%	1,901	47.8%	1,181	46.6%
Total	5,117		3,498		2,582		3,978		2,532	
Age Group	**Total Reg.**		**Nov. 2022**		**Nov. 2021**		**Nov. 2020**		**Nov. 2019**	
18-34	1,018	19.9%	477	13.6%	238	9.2%	697	17.5%	237	9.4%
35-44	901	17.6%	567	16.2%	391	15.1%	623	15.7%	322	12.7%
45-54	819	16.0%	557	15.9%	422	16.3%	631	15.9%	388	15.3%
55-64	851	16.6%	642	18.4%	495	19.2%	745	18.7%	589	23.3%
65+	1,528	29.9%	1,255	35.9%	1,036	40.1%	1,282	32.2%	996	39.3%
Total	5,117		3,498		2,582		3,978		2,532	
Party	**Total Reg.**		**Nov. 2022**		**Nov. 2021**		**Nov. 2020**		**Nov. 2019**	
Unaffiliated	2,452	47.9%	1,524	43.6%	1,032	40.0%	1,681	42.3%	929	36.7%
Democrat	1,690	33.0%	1,326	37.9%	1,044	40.4%	1,473	37.0%	1,036	40.9%
Republican	888	17.4%	612	17.5%	488	18.9%	775	19.5%	539	21.3%
Libertarian	53	1.0%	26	0.7%	12	0.5%	36	0.9%	15	0.6%
Other	34	0.7%	10	0.3%	6	0.2%	13	0.3%	13	0.5%
	5,117		3,498		2,582		3,978		2,532	

Survey Translation for Spanish Speaking Residents

If a Spanish translation is needed for this project, we partner with Marina La Grave of Colorado Language Access & Cultural Experts (CLACE) for Spanish language translation. CLACE is a Boulder-based intercultural communication and engagement company with over three decades of experience in translation, transcreation, and interpretation services.

Magellan Strategies 2021 Ballot Measure Track Record

One method of evaluating an opinion research firm is how well they have forecasted voter support and opposition for past ballot measures. Following is our ballot measure survey from the 2021 election cycle. The data collection method for all these survey projects was MMS text and telephone.

#	Ballot Measure	Magellan's Forecast	Actual 'Yes'	Percent Difference
1	Town of Monument 2F Police Funding 0.5% Sales Tax Increase	64%	63%	1%
2	Town of Monument 2G Begin Home Rule Process	62%	59%	3%
3	City of Boulder 2I 0.3% Sales Tax Extention for Capital Projects	74%	85%	11%
4	City of Boulder 2J $110 Million Bond for Capital Projects	65%	79%	14%
5	City of Lafayette 2B 0.27% Sales Tax Increase for Public Safety	67%	66%	1%
6	City of Lafayette 2C 0.1% Sales Tax Increase for Mental Health	72%	71%	1%
7	Town of Vail 2A 0.5% Sales Tax Increase for Affordable Housing	57%	54%	3%
8	Mesa County Valley School District 51 $115 Million Bond for High School	61%	65%	4%
9	EagleVail Metro District Property Tax Freeze	61%	72%	11%
10	City of Golden 2A Allow Retail Marijuana	54%	51%	3%
11	Moffat County School District RE-1 $40 Million Bond for Schools	43%	37%	6%

Collaborating With the City of Salida Communication Team

When we manage a survey project for a local government client, we collaboratively work with the communication team to promote the survey. This includes preparing email communications, social media copy, and the distribution of survey QR codes. For this survey project, we anticipate going through these steps.

Magellan Strategies Survey Deliverables

Our survey research project deliverables include a topline document, crosstabs, verbatim responses, a PowerPoint presentation, and a written summary of findings.

Sample Survey Deliverables

| Topline Document | Crosstabs | Verbatim Responses | Presentation | Written Summary |

City of Salida Ballot Measure Survey Project Pricing

The following survey characteristics determine the cost of a project:

➢ The survey data collection method. The options are interviewing respondents using a call center, sending MMS text invitations, or a hybrid of both approaches. Phone interviews are much more costly than sending MMS text invitations.

➢ The number of questions in the survey. Simply put, the more questions in a survey, the higher the cost to complete a phone interview. Furthermore, more questions translate into more time for our staff to process the survey.

➢ The survey total interview goal. Again, simply put, a survey with a total interview goal of 400 interviews will be less costly than a survey with a total interview goal of 500 interviews.

Following is a range of pricing for different survey options. Furthermore, it is common to exceed our "text goal" and keep all completed interviews. Considering the nature of this survey project, we anticipate completing at least 575 MMS text interviews. Finally, a Spanish survey translation will add $500 to the pricing below.

600 Interview MMS Text/Telephone Hybrid Survey Pricing
26 to 35 questions, 14-minute phone survey (565 Text, 35 Phone) $18,500
20 to 25 questions, 12-minute phone survey (565 Text, 35 Phone) $16,000

MMS Text Message Only Survey Pricing
600 interviews, up to 35 questions..$12,500

Summary
We look forward to discussing our proposal with City Administrator Drew Nelson and the City of Salida soon. Following are examples of our past work history, project contact information, and staff biographies.

Magellan Strategies Work History and Experience
As we mentioned earlier, our team has been providing accurate, effective, and affordable voter opinion research to Colorado governments and special districts for a long time. Following is a summary of some of our voter opinion research projects in the past few years with a contact name and email.

Town of Erie, Home Rule and Parks and Recreation Ballot Measure Survey, 2022
We conducted two different surveys for the Town of Erie. The first survey measured voter support for Erie becoming a Home Rule municipality. The second was regarding a property tax extension to continue the Trails, Natural Areas, and Community Character (TNACC) fund. Reference: Gabi Rae, Communications and Community Engagement Director, (303) 926-2719, grae@erieco.gov.

City of Lafayette, Issues 2B and 2C, June 2021
Our voter opinion research services determined support and opposition levels for two ballot measures to raise the sales tax in the City of Lafayette to fund public safety and mental health services in the community. Our survey showed 67% support, and Issue 2B passed with 66% support. For Issue 2C, our survey showed 72% support, which passed with 71% support from the community. Reference: Debbie Wilmot, Director of Communications, debbie.wilmot@lafayetteco.gov.

City of Boulder, Issues 2I and 2J, Nov. 2021
We measured voter support and opposition levels for this project for two ballot measures. The first would extend a 0.3% sales tax to fund capital projects, and the other would allow the city to issue $110 million in bonds to pay for the projects. We measured support levels at 74% and 65%, respectively, and both measures passed with 79% support. Reference: Devin Billingsley, Interim Finance Director, City of Lafayette (Former Senior Finance Manager, City of Boulder), (303) 661-1245, devin.billingsley@lafayetteco.gov.

City of Boulder, Carbon Pricing Survey, February 2019
We conducted a survey for the City Department of Climate Initiatives & Sustainability Office to measure voter opinion of the City's climate initiative programs, support for a local carbon

pricing policy, and awareness of the City's Climate Action Plan Tax, or "CAP" tax. The research project also measured support and opposition for a local climate tax and a vehicle climate fee proposal. Reference: Alison Ecklund, Community Relations Coordinator, (720) 576-8593, ecklunda@bouldercolorado.gov.

Boulder Valley School District Ballot Measure Survey, May 2022
We conducted a survey measuring voter support for a property tax increase to fund critical facilities needs in Boulder Valley School District. Reference: Susan Cousins, Bond Communications Specialist, (720) 561-5793, susan.cousins@bvsd.org.

City of Castle Pines Community Survey, September 2022
We completed a 56-question community survey to measure and understand Castle Pines residents' thoughts and opinions of city services, programs, budget priorities, and quality of life aspects. The survey established opinion benchmarks of the performance of city services and amenities. Reference: Michael Penny, City Manager, (303) 705-0206, michael.penny@castlepinesco.gov.

Town of Gypsum Community Survey, September 2022
We completed a 76-question community survey to measure and understand Gypsum residents' thoughts and opinions of town services, programs, budget priorities, and quality of life aspects. The survey established opinion benchmarks of the performance of town services and amenities. Reference: Taylor Slaugh, Communications & Marketing Manager, (970) 524-1723, taylor@townofgypsum.com.

City of Glenwood Springs Community Survey, September 2021
We completed a 77-question community survey to measure and understand Glenwood Springs residents' thoughts and opinions of city services, programs, budget priorities, and quality of life aspects. The survey established opinion benchmarks of the performance of city services and amenities. Reference: Jennifer Ooton, Assistant City Manager, (970) 384-6404, jenn.ooton@cogs.us.

Town of Monument Community Survey, April 2021
We completed a 76-question community survey to measure and understand Monument residents' thoughts and opinions of town services, programs, budget priorities, and quality of life aspects. The survey established opinion benchmarks of the performance of town services and amenities. Reference: Mike Foreman, Town Manager, (719) 322-3043, mforeman@tomgov.org.

Town of Wellington Community Survey, June 2021
We completed a community survey to measure and understand Wellington residents' thoughts and opinions of town services, programs, budget priorities, and quality of life aspects. The survey established opinion benchmarks of the performance of town services and amenities. Reference: Mahalia Henschel, Communications Specialist,
(970) 568-3381, henschem@wellingtoncolorado.gov.

27J Schools Ballot Measure Survey, August 2022

The focus of this survey was to measure and understand voter opinion of the school district and support and opposition levels for an 8-mill increase to fund the recruitment and training of high-quality teachers and enhanced career-focused learning and technical education STEM programs. Reference: Janelle Asmus, District Communications Director, jasmus@sd27.net.

Weld RE-4 School District Post Election Survey, January 2022

In the 2020 election, voters in the Weld RE-4 School District rejected two education funding ballot measures that would have funded school construction projects. The survey aimed to measure and understand the school district's overall image and job approval and why voters rejected these ballot measures. The survey information will be used to seek voter approval again in the 2022 election. Reference: Katie Messerli, katharine.messerlit@weldre4.org.

Citizens for Mesa County Valley School District 51, Issue 4B, April 2021

Our voter opinion research services determined support and opposition levels for a ballot measure for a $115 bond for a new high school in Mesa County Valley School District 51. Our survey showed 61% support, and Issue 4B passed with 65% support. Reference: Sarah Shrader, Citizens for School District 51, sshrader@bonsai-design.com.

Moffat County School District RE-1, April 2021

This school district asked voters to approve an 11.9 mill levy increase to fund $40 million in school building infrastructure upgrades and repairs. Our survey found a majority of likely voters were opposed to the ballot measure primarily due to the cost being $170 per year on a home valued at $200,000. Our survey projected 43% support in November, and the actual result from our survey was 43% 'No.' Reference: Scott Pankow, Superintendent, scott.pankow@moffatsd.org.

Town of Vail, Issue 2A, November 2021

Our voter opinion research services determined support and opposition levels for a ballot measure to raise the sales tax in the Town of Vail to fund affordable housing for the community. Our survey showed 57% support, and Issue 2A passed with 54% support. Reference: Scott Robson, Town Manager, (970) 479-2105, srobson@vailgov.com; Travis Coggin, Vail Town Council, (307) 690-3716, tcoggin@vailgov.com.

Town of Monument, Issue 2F, May 2021

Our voter opinion research services determined support and opposition levels for a ballot measure for a .5% sales tax for public safety in the Town of Monument. Our survey showed 64% support, and Issue 2F passed with 63% support. Reference: Mike Foreman, Town Manager, (719) 322-3043, mforeman@tomgov.org.

Town of Vail, Ballot Issue 2G, November 2020

We helped the Town of Vail with their voter opinion survey to measure support and opposition for a "de-Gallagher" ballot measure that would allow the town to keep the residential assessment rate "flat." Our survey showed 52% support for the ballot measure after hearing information about it. The ballot measure passed with 54% support. Reference: Suzanne Silverthorne, (970) 479-2115, ssilverthorn@vailgov.com; Patty McKenny, (970) 479-2113, pmckenny@vailgov.com.

Montezuma County, December 2021

Our voter opinion research services determined support and opposition levels for creating a 1.9% county sales tax ballot measure that may be placed on the November 2022 ballot. Reference: Shak Powers, County Administrator, (970) 565-8317, spowers@co.montezuma.co.us.

Buffalo Mountain Metro District, Ballot Issue 6A, November 2020

Buffalo Mountain Metro District in Summit County hired our team to do polling and messaging for a 4% sales tax increase. This was a unique project in that eligible voters were property owners; some lived in the district year-round, while others rented out their properties. Our polling services identified messages that increased support from 42% to 67%. This ballot measure passed with 63% support. Reference: Shellie Duplan, (970) 513-1300, shellie@bmmd.org.

City of Castle Pines, Ballot Issue 2A, November 2020

Our team did extensive opinion research for the City of Castle Pines in 2020, focusing on community support and interest in a potential recreation center, road funding, and other local tax measures under consideration. Our research helped council and staff decide to only put a road funding measure before voters. Although Ballot Issue 2A did not pass, our work helped them make critical decisions. Reference: Michael Penny, City Manager, (720) 312-1396, michael.penny@castlepinesco.gov.

Gunnison County Library District, Issue 6A, November 2019

Our voter opinion research services determined support and opposition levels for a ballot measure to fund the construction of a new library in Gunnison County, Colorado. Our survey showed 58% support, and Issue 6A passed with 56.4% support. Reference: Drew Brookhart, (970) 596-8544.

Magellan Staff Biographies

David Flaherty

David Flaherty is the CEO and founder of Magellan Strategies, a public opinion survey research firm. David has spent his 29-year career designing and conducting hundreds of survey research projects measuring public and voter opinion. He is an expert public opinion pollster, focus group moderator, and voter data analyst.

Before forming Magellan Strategies in 2006, David worked in Washington, DC, for fourteen years. During that time, he learned the art of voter opinion research, questionnaire design, message development, and voter demographic trends while working at the Republican National Committee, the US House of Representatives (Subcommittee on the Census), Americans for Prosperity, and a small government relations firm.

For the past fourteen years, David has led the Magellan team's growth and diversification into survey research services for local governments, school districts, special districts, and public policy organizations. In addition, he is proud to have helped more than 100 Colorado governments and special districts achieve voter approval for a wide array of funding ballot measures.

David is a native of Wellesley, Massachusetts, and is a 1991 graduate of the University of Delaware. He lives in Broomfield, Colorado, with his wife, Jennifer, and their two sons, Jack and Bobby. David is an avid skier, golfer, mountain biking rookie, and reader of political history.

Courtney Sievers, MPA
Senior Director of Survey Research and Data Modeling

Courtney has been with Magellan Strategies since 2009. She is the point person for our quantitative research projects and our team leader for our data modeling clients. During her time at Magellan, Courtney has managed hundreds of opinion research projects and built sophisticated voter models in more than 20 states.

Courtney is an expert in using the statistical software packages of SPSS, Uncle, and R. She also has extensive experience with qualitative focus group projects, attendee recruitment, discussion guide design, and sentiment analysis.

Courtney holds a bachelor's degree in Mathematics with a concentration in Statistics from Colorado Mesa University and a master's degree in Public Administration from the University of Colorado Denver. She and her husband, Jake, live in Arvada with their daughter Riley. In her spare time, she loves to play soccer and ski.

Ryan Winger
Polling Project Manager and Director of Data Analysis

Ryan has been with Magellan Strategies since 2007 and wears several "hats" in our firm. First, Ryan manages and oversees "all things data" for Magellan, including the construction of our in-house resident and voter sample databases for our opinion research projects. Successful opinion research projects begin with a comprehensive and complete master database of the population we are trying to measure. Ryan's data skills and expertise make that happen.

He is also an expert in applying Facebook advertising and "IP targeting" strategies to help special districts and smaller government clients run more effective ballot measure campaigns. Over the years, Ryan has solved voter data problems for more than 100 Colorado campaign clients. He is also an experienced campaign manager and general consultant.

Ryan is a graduate of the University of Colorado with a degree in Political Science. He resides in Firestone with his wife, Vicki, and their three children, Emmalyn, Easton, and Everly. Ryan is a huge college basketball fan and supporter of the Kansas Jayhawks.

Craig Haverback
Vice President, Operations & Strategy

Craig is our Vice President of Operations & Strategy and one of our polling project managers. He manages projects for our partners and clients in local government, special districts, and public policy groups while growing our business across Colorado and the US.

Craig has an extensive background in high-performing organizations, including the US Department of Homeland Security, PricewaterhouseCoopers (PwC), Hewlett-Packard (HP), and SAP. At PwC, in addition to strategic planning and business development, he was an IT project manager for commercial and federal clients. At HP, he established a Center of Excellence for Project Management and developed and led a Program Management Office to support the US Navy.

Craig has a BA from Colgate University and an MS in the Management of IT from the University of Virginia. He is from Falls Church, VA, and lives outside Washington, DC, with his wife, Heather, and three children, Madeline, Mary, and Ford.