

# Election Opinion Poll Services for the City of Hercules

## *Polling and Strategic Communications Proposal*



Contacts:

Catherine Lew, The Lew Edwards Group

Curtis Below, FM3 Research



OPINION  
RESEARCH  
& STRATEGY

August 26, 2025

City of Hercules  
City Clerk's Office  
111 Civic Drive  
Hercules, CA 94547

Dear Hercules City Clerk:

The Lew Edwards Group (LEG) and Fairbank, Maslin, Maullin, Metz & Associates (FM3) are pleased to present this joint proposal to provide public opinion research and public communications services for the City of Hercules for a fifth successful partnership. Per the RFP, if selected for this work, LEG will serve as the prime consultant, with FM3 as the polling subcontractor.

A 2025-2026 partnership with LEG/FM3 would provide the City of Hercules with:

- ✓ **A team with an unparalleled track record of success towards the City's long-term fiscal sustainability:** Measure N (2022), Measures O and N (2012), Measure A (2013), Measures B and C (2015), partial LLAD enactments in 2017, and successful measures for other Contra Costa County clients including Rodeo-Hercules Fire Protection District; the cities of Antioch, Concord, El Cerrito, Martinez, Moraga, Orinda, Pinole, Pittsburg, Pleasant Hill, and San Ramon; Contra Costa County Community College District; West Contra Costa Unified School District; East Bay Regional Park District; Bay Area Rapid Transit District; and the County of Contra Costa.
- ✓ **California leaders in passing revenue measures.** Both LEG and FM3 have 95% win rates—FM3 has helped local government clients generate hundreds of billions of dollars and LEG has helped over 300 public entity clients enact nearly \$50 billion. Working together and separately, both firms have winning expertise in sales tax, charter, RPTT, and GO bond measures and are actively representing clients for the 2026 cycle for all measure types. Should the City be interested in a sales tax, you would be retaining the top sales tax consultants in California.
- ✓ **FM3 continues to utilize the most up-to-date survey techniques** to increase overall response rates, reflecting a variety of different engagement methods used in modern public opinion research.
- ✓ **LEG is a nationally recognized, award-winning firm** in public agency engagement and communications.
- ✓ **Our firms reflect the diversity of California and the East Bay** with a consensus-building management style and focused, enthusiastic, and committed dedication to your needs.

We would love to continue supporting the City of Hercules on a fifth successful project to strengthen Council and staff's fiscal sustainability vision. Catherine will be the primary contact for the proposal: The Lew Edwards Group, 5454 Broadway, Oakland, CA 94618. Email her at [catherine@lewedwardsgroup.com](mailto:catherine@lewedwardsgroup.com) or call 510-332-7421.

Warmly,

A blue ink signature of Catherine Lew, written in a cursive style.

Catherine Lew, LEG President

A blue ink signature of Curt Below, written in a cursive style.

Curt Below, FM3 Partner & COO

## CONTENTS

1	ABOUT OUR TEAMS .....	1
2	RELEVANT EXPERIENCE.....	3
3	CLIENT REFERENCES.....	9
4	STRATEGIC CONSIDERATIONS .....	10
5	SCOPE OF SERVICES – FM3 .....	10
6	SCOPE OF SERVICES – LEG.....	11
7	SAMPLE THUMBNAIL TIMELINE.....	13
8	BUDGET .....	15

# 1 ABOUT OUR TEAMS

## 1.1 Prior Experience with the City of Hercules

It has been LEG/FM3’s honor to have represented the City successfully for 15 years in supporting your fiscal sustainability vision (**Figure 1**). Our invaluable institutional knowledge means our team can hit the ground running with the benefit of those years of experience and our shared success for Hercules’s unique, dynamic, and diverse community.

**Figure 1: LEG and FM3’s Winning Experience in the City of Hercules**

<p>In 2012, LEG/FM3 successfully enacted <b>Measures O and N</b> in a low turnout June Primary, winning the City’s successful ½-cent sales tax measure and a measure authorizing the sale of its Municipal Utility, both strategies designed to stabilize the City’s fiscal condition following the City’s declaration of Fiscal Emergency. On an exceptionally short timeframe, LEG/FM3 sprang into action, conducting on-point public opinion research and accessible, easy-to-understand communications materials to inform the community of the City’s fiscal needs.</p>
<p>In 2013, LEG/FM3 successfully enacted <b>Measure A</b> to increase the City’s UUT rate by 2% in a low turnout Special Election. Following FM3’s opinion research, LEG created highly effective messaging and trained public safety and fiscal accountability leaders to address the community’s concerns at the time about the City’s management.</p>
<p>In 2015, LEG/FM3 successfully enacted <b>Measures B and C</b> to extend the sales tax and UUT measures simultaneously on the same ballot, following comprehensive polling and outreach programs. In 2017, LEG supported the City’s effort to achieve LLAD reform citywide and update its LLAD structure (the unique zones were too small to conduct statistically valid polling). A portion of the City enacted the assessment.</p>
<p>In 2022, LEG/FM3 successfully enacted <b>Measure N</b> to renew the City’s UUT at a rate of 8% until ended by voters, despite outspoken opposition by the <i>Mercury News</i>. Measure N was enacted by a more than two-thirds margin. Our team also initiated a viability assessment analysis for a potential combined charter/RPTT measure. While it was not feasible to put both measures on the ballot that year, FM3 can track those results to the present day.</p>

## 1.2 Short LEG Refresher

LEG is an Alameda County-based California corporation co-founded in 1997 by Catherine Lew and the late Lloyd Edwards. The firm is a woman and BIPOC-founded firm that is a nationally recognized, award-winning company in providing communications, revenue generation, and strategic services to California public agencies and local governments, having served over 300 of them for nearly three decades. In 2024, the firm had its biggest year ever, overseeing 88 measures and campaign projects and winning 84, maintaining its 95% win rate. LEG has enacted nearly \$50 billion.

Public agencies constitute more than two-thirds of LEG’s practice, and its core team of seven professionals have served LEG’s client needs for years with expertise that includes media, social media, and internet communication; coalition building; ballot measure needs; and more.

Experts from LEG are frequently sought after as trainers and speakers for the League of California Cities, California Municipal Treasurers Association, California Society of Municipal Finance Officers, Local Government Commission, Institute for Local Governments, Municipal Management Association of Northern California, and others. LEG's direct mail products have been recognized on multiple occasions in the prestigious national Pollie Awards.

### 1.3 Short FM3 Refresher

FM3 is a California-based company with 24 full-time employees located primarily in their Berkeley and Los Angeles offices. FM3 has been conducting public policy-oriented opinion research since 1981 on issues of major economic and social concern, such as budgetary issues and taxation, education, constituent satisfaction with public services and support for policy proposals, public safety, parks and open space, 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 as many as 400 surveys and 150 focus groups (as well as other types of opinion research), which the firm uses to provide strategic insights and advice to its clients. Most importantly, FM3 is a recognized leader in conducting survey research that helps California cities objectively evaluate the viability of passing local ballot measures to secure additional revenue. FM3 has worked successfully in more than 160 California cities to develop strategies to pass revenue measures, with a success rate of over 95% since its 1981 inception—with over 700 local finance measures approved for California agencies in every region of the state—more than any other research firm.

### 1.4 Project Team

The LEG/FM3 executives leading your effort will be the principals who have led the City to success in past years. Both firms will also assign one additional project manager per firm following discussion with the City on its 2026 ballot measure needs.

#### 1.4.1 Catherine Lew, Esq. (LEG Co-Founder & Principal Consultant)



Catherine Lew, Co-Founder and Principal Consultant of The Lew Edwards Group, is a premier consultant in California providing revenue enhancement measure preparation, project management, public sector marketing services, and political strategy to cities, counties, special districts, transportation, K-14 education districts, and other public agencies, private sector, and nonprofit clients.

Lew has over 30 years of experience in the communications and political arena. She is a veteran of more than 800 similar projects, specializing in difficult-to-pass revenue measures. In 2018, she was named by the *Sacramento Bee* as a California Influencer, joining selected statewide leaders in politics, policy, and government shaping the current election dialogue through the Bee/McClatchy news mediums. Lew has been the Lead Communications Consultant on all successful measures previously represented in Contra Costa County, including every successful Hercules project.

Lew prides herself on her firm’s excellent service to each LEG client, diverse agencies and organizations that range dramatically in size and scope of strategic needs. She has earned a reputation as one of the State’s most effective specialists on behalf of local government.

A graduate of the University of California, Berkeley and the University of San Francisco School of Law, Lew is also a member of the California State Bar, ensuring excellent team collaboration with client city attorneys to ensure that all strategies sponsored by public entities are within the bounds of legal permissibility. If retained as your Consultant, Catherine will function as Lead Strategist with a second member of the firm assigned as Project Manager.

#### 1.4.2 Curtis Below (FM3 Partner & COO)



FM3 Partner & COO Curtis Below brought his broad professional experience in the public, nonprofit and private sectors to FM3 Research in 2007. Since joining the firm, he has provided qualitative and quantitative research—and strategic advice—to government agencies, nonprofit organizations, businesses, and candidate and ballot measure campaigns at both the state and local levels. Curtis has served as Project Manager for each of FM3’s surveys for the City of Hercules since 2012.

During the last several election cycles, Curtis conducted research contributing to the passage of a number of ballot measure campaigns, including California's Prop 1 (a \$4 billion housing bond) and Prop 68 (a \$4 billion park and water bond); two significant regional funding measures in the San Francisco Bay Area (a \$3.5 billion BART bond measure and a nine-county “Clean & Healthy Bay” parcel tax); a number of local finance measures in the cities of Alameda, Antioch, Cotati, Daly City, East Palo Alto, Half Moon Bay, Los Banos, Martinez, Milpitas, Orinda, Pittsburg, San Jose, San Mateo, Santa Rosa, Scotts Valley, Sunnyvale and Vallejo, and in Santa Clara, Santa Cruz, Humboldt, Tuolumne, Yuba counties; as well as other local measures for school, fire, and park districts. Curtis also worked on behalf of several successful candidates, including those running for U.S. Congress, the California Legislature, and local county boards of supervisors.

Curtis received his bachelor’s degree in Geography/Environmental Studies from UCLA and both his Master of Public Policy degree and Master of Public Health degree from UC Berkeley.

## 2 RELEVANT EXPERIENCE

### 2.1 LEG's Contra Costa County Experience

In addition to the multiple measures enacted for the City of Hercules, LEG has enacted and maintained millions in revenue for other Contra Costa County local government clients (**Figure 2**).

**Figure 2: LEG's Successful Local Government Ballot Measures in Contra Costa County**

Local Government Entity	Ballot Measure Type
City of Antioch	Sales Tax Renewal
City of Concord	Sales Tax Measures (3)
Contra Costa County CCD	General Obligation Bond
City of El Cerrito	Sales Tax Measures (4) + RPPT Measure
Los Medanos Healthcare District	Maintenance of Local Control
City of Martinez	Sales Tax Measure
Town of Moraga	Sales Tax Measure
City of Pinole	Sales Tax Measures (2)
City of Pleasant Hill	Sales Tax Measure
Rodeo Hercules Fire Protection District	Parcel Tax Measure
City of San Ramon	Landscape & Lighting Assessment

Additionally, LEG has led national and groundbreaking communications projects and advisory services for:

- West Contra Costa County Integrated Waste Management Authority (innovative Earth Day)
- City of El Cerrito 2025 Library Bond Assessment
- City of Richmond (national media on Federal designation of Rosie the Riveter Park)
- City of Walnut Creek (advisory fiscal planning)

## 2.2 FM3's Contra Costa County Experience

FM3 has extensive experience conducting research in Contra Costa County, which has provided us with a comprehensive understanding of the county's residents and voters. As a result, our team is deeply familiar with not only the local electorate but also the issues, cycles and rhythms of local public opinion and its evolution over time. In addition, because of our convenient location in Berkeley, FM3 personnel are readily available to participate in meetings with City staff. Some of the clients we have conducted research for within the County include:

- **Local clients** such as Contra Costa County; the cities of Antioch, Concord, Hercules, Orinda, Martinez, Pinole, Pittsburg, Richmond, and San Ramon; West Contra Costa Unified School District; and Contra Costa Community College District
- **Various special districts and agencies** such as Bay Area Rapid Transit District, Contra Costa County Flood Control and Water Conservation District, Contra Costa County Mosquito & Vector Control District, Central Contra Costa Sanitary District, Delta Diablo Sanitation District, Dublin San Ramon Services District, Metropolitan Transportation Commission, Oakland Zoo, Port of Oakland, Rodeo-Hercules Fire Protection District, and Zone 7 Water Agency
- **Environmental groups** such as Resources Legacy Fund and the Sierra Club
- **Labor unions** such as IBEW, SEIU, and AFSCME
- **Nonprofit healthcare providers** such as Sutter Health and Stanford Lucile Packard Children's Hospital
- **Foundations** such as The California Endowment
- **Select corporate clients** such as Calpine



A listing of FM3's successful local finance measures in Contra Costa County is provided in **Figure 3** below.

**Figure 3: FM3 Successful Local Finance Measures in Contra Costa County**

Agency	Measure	Mechanism	Election
City of Pinole	Measure H	½ Cent Sales Tax	November 2024
City of Martinez	Measure F	\$79/Parcel Tax	June 2022
Contra Costa County	Measure X	½ Cent Sales Tax	November 2020
City of Orinda	Measure R	1 Cent Sales Tax Ext. & Incr.	November 2020
City of Richmond	Measure U	Business Tax	November 2020
City of Antioch	Measure W	1 Cent Sales Tax Extension	November 2018
City of Martinez	Measure X	½ Cent Sales Tax	November 2018
City of Orinda	Measure J	Parcel Tax Increase: \$39 to \$69	June 2018
City of Martinez	Measure D	½ Cent Sales Tax	November 2016
Rodeo-Hercules Fire Protection District	Measure O	\$218/Parcel Tax	November 2016
City of Pittsburg	Measure M	½ Cent Sales Tax Extension	June 2016
City of Orinda	Measure L	\$25 Million Bond	June 2016
City of Hercules	Measure B	½ Cent Sales Tax Extension	November 2015
City of Hercules	Measure C	Utility Users Tax Extension	November 2015
City of Orinda	Measure J	\$20 Million Bond	June 2014
City of Hercules	Measure A	Utility Users Tax 2% Increase	June 2013
City of Orinda	Measure L	½ Cent Sales Tax	November 2012
City of Hercules	Measure O	½ Cent Sales Tax	June 2012
City of Martinez	Measure H	\$30 Million Bond	November 2008
City of Orinda	Measure E	Parcel Tax Increase: \$27 to \$39	June 2008
City of San Ramon	LLAD	LLAD Increase	June 2006
East Bay Regional Park District	Measure CC	\$12/Parcel Tax	November 2004
Contra Costa Community College District	Measure A	\$120 Million Bond	March 2002
West Contra Costa Unified School District	Measure D	\$380 Million Bond	March 2002

### 2.3 Enacted Sales Taxes, GO Bonds, RPTTs, and Charter City Measures

In addition to our work specifically for the City of Hercules and other Contra Costa County government agencies, both FM3 and LEG have helped scores of other California public entities win general obligation bond, real property transfer tax, and charter measures, and in some cases, multiple measures for the same agency. It also bears noting that LEG/FM3 are the sales tax leaders in California.

**Figure 4: LEG/FM3's Successful Sales Tax, GO Bond, RPTT and Charter Ballot Measure Clients**

*(While LEG/FM3 have a significant practice in K-14 bonds, school bonds are not included in this list.)*

Local Government Entity	Sales Tax/GO Bond/RPTT/Charter	LEG/FM3
City of Alameda	RPTT	FM3
Alameda County	Fire Facility Bond	LEG
City of Alhambra	Sales Tax	LEG/FM3
City of Arcadia	Sales Tax	LEG/FM3



Local Government Entity	Sales Tax/GO Bond/RPTT/Charter	LEG/FM3
City of Artesia	Sales Tax	LEG/FM3
City of Arvin	Sales Tax	LEG/FM3
City of Atwater	Sales Tax	LEG/FM3
City of Azusa	Sales Tax (2 measures)	LEG/FM3
City of Bakersfield	Sales Tax	LEG/FM3
City of Bellflower	Sales Tax	LEG/FM3
City of Belmont	Library Bond + Sales Tax	LEG
City of Benicia	Sales Tax	LEG/FM3
City of Buena Park	Sales Tax	LEG/FM3
City of Burlingame	Sales Tax	LEG
City of Campbell	Sales Tax (2 measures)	LEG/FM3
City of Cathedral City	Charter + Sales Tax (3 measures)	LEG/FM3
City of Chowchilla	Sales Tax (2 measures)	LEG/FM3
City of Clovis	Sales Tax (2 measures)	LEG/FM3
City of Corona	Sales Tax	LEG/FM3
City of Cotati	Sales Tax	LEG/FM3
City of Daly City	Sales Tax	LEG/FM3
City of Desert Hot Springs	Sales Tax	LEG/FM3
City of Dinuba	Sales Tax	LEG/FM3
City of Downey	Sales Tax	LEG/FM3
City of East Palo Alto	Sales Tax	LEG/FM3
City of El Cerrito	RPTT + Sales Tax (4 measures)	LEG
City of Elk Grove	Sales Tax	LEG/FM3
City of Emeryville	Civic Center Bond + RPTT/Charter	LEG
City of Escondido	Public Safety Bond	LEG/FM3
City of Eureka	Sales Tax	LEG
City of Exeter	Sales Tax	LEG/FM3
City of Fairfield	Sales Tax	LEG
City of Fort Bragg	Sales Tax	LEG/FM3
City of Fountain Valley	Sales Tax	LEG/FM3
Fresno County	Sales Tax (3 measures)	LEG/FM3
City of Galt	Sales Tax (2 measures)	LEG/FM3
City of Garden Grove	Sales Tax	LEG/FM3
City of Gardena	Sales Tax	LEG/FM3
City of Gilroy	Library Bond	LEG/FM3
City of Grover Beach	Sales Tax	LEG/FM3
City of Hollister	Sales Tax	LEG/FM3
Humboldt County	Sales Tax	LEG/FM3
Imperial County	Sales Tax	LEG/FM3
City of Imperial Beach	Sales Tax	LEG/FM3
City of Indio	Sales Tax (2 measures)	LEG/FM3
City of Inglewood	Sales Tax	LEG/FM3
Kern County	Sales Tax	LEG/FM3
La Canada Flintridge	Sales Tax	LEG/FM3

Local Government Entity	Sales Tax/GO Bond/RPTT/Charter	LEG/FM3
City of La Habra	Sales Tax (2 measures)	LEG/FM3
City of La Mesa	Public Safety Bond + Sales Tax	LEG/FM3
City of La Mirada	Sales Tax	LEG
City of La Palma	Sales Tax	LEG
City of Lake Elsinore	Sales Tax	LEG/FM3
City of Lakeport	Sales Tax	LEG/FM3
City of Lakewood	Sales Tax	LEG/FM3
City of Larkspur	Sales Tax	LEG/FM3
City of Lathrop	Sales Tax	LEG/FM3
City of Lawndale	Sales Tax	LEG
City of Los Banos	Sales Tax (2 measures)	LEG/FM3
City of Manteca	Sales Tax	LEG/FM3
City of Marina	Sales Tax	LEG/FM3
City of Martinez	Sales Tax	LEG/FM3
City of Menifee	Sales Tax	LEG/FM3
City of Millbrae	Library Bond	LEG
City of Milpitas	Sales Tax	LEG/FM3
Town of Moraga	Sales Tax	LEG
City of Moreno Valley	Sales Tax	LEG/FM3
City of Morro Bay	Sales Tax	LEG/FM3
City of Mountain View	RPTT	LEG
City of Napa	Sales Tax IE	LEG
City of National City	Sales Tax	LEG/FM3
Nevada County	Sales Tax	LEG
City of Norco	Sales Tax	LEG/FM3
City of Novato	Sales Tax	LEG/FM3
City of Oxnard	Sales Tax	LEG/FM3
City of Pacifica	Sales Tax	LEG/FM3
City of Palm Springs	Sales Tax	LEG
City of Palo Alto	Library Bond	LEG/FM3
City of Pasadena	Sales Tax + Library Bond	LEG/FM3
City of Paso Robles	Sales Tax	LEG/FM3
City of Petaluma	Sales Tax	LEG/FM3
City of Pinole	Sales Tax (2 measures)	LEG/FM3
City of Placentia	Sales Tax	LEG
City of Pleasant Hill	Sales Tax	LEG
City of Porterville	Sales Tax	LEG/FM3
City of Port Hueneme	Sales Tax	LEG
City of Rancho Cordova	Sales Tax (2 measures)	LEG
City of Redondo Beach	Safety Bond	FM3
City of Reedley	Sales Tax	LEG/FM3
City of Ridgecrest	Sales Tax	LEG
City of Riverside	Sales Tax	FM3
City of Rohnert Park	Sales Tax	LEG/FM3

Local Government Entity	Sales Tax/GO Bond/RPTT/Charter	LEG/FM3
City of Roseville	Sales Tax	LEG
Sacramento Metro Fire District	Fire/Emergency Bond	FM3
City of San Bruno	Sales Tax	LEG
City & County of San Francisco	RPTT + Health/Safety Bond + Affordable Housing Bond	FM3
City of San Jose	Sales Tax + RPTT	LEG/FM3
City of San Leandro	Sales Tax (2 measures)	LEG
City of San Luis Obispo	Sales Tax (2 measures)	LEG/FM3
City of San Mateo	Sales Tax	LEG
City of Sanger	Sales Tax (3 measures)	LEG/FM3
City of Santa Maria	Sales Tax (2 measures)	LEG
City of Santa Paula	Sales Tax	LEG/FM3
City of Santa Rosa	Sales Tax (2 measures)	LEG/FM3
Saratoga Fire Protection District	Fire Facility Bond	LEG
City of Sausalito	Sales Tax	LEG/FM3
Santa Cruz County	Sales Tax	LEG
City of Seal Beach	Sales Tax (2 measures)	LEG/FM3
City of Seaside	Sales Tax (2 measures)	LEG/FM3
City of Selma	Sales Tax	LEG/FM3
City of Signal Hill	Sales Tax	LEG
City of St. Helena	Sales Tax	LEG
City of Solana Beach	Sales Tax	LEG/FM3
City of Solvang	Sales Tax	LEG
Sonoma County	Library Sales Tax	LEG
City of South Gate	Sales Tax	LEG/FM3
City of South Lake Tahoe	Sales Tax	LEG/FM3
City of South San Francisco	Sales Tax	LEG
City of Stanton	Sales Tax	LEG/FM3
City of Stockton	Sales Tax (2 measures)	LEG/FM3
City of Suisun City	Sales Tax	LEG
City of Taft	Sales Tax	LEG/FM3
City of Tehachapi	Sales Tax	LEG/FM3
City of Temecula	Sales Tax	LEG/FM3
City of Tracy	Sales Tax	LEG
Tulare County	Sales Tax	LEG/FM3
City of Turlock	Sales Tax	LEG/FM3
City of Union City	Sales Tax	LEG
City of Vallejo	Sales Tax (2 measures)	LEG/FM3
City of Visalia	Sales Tax (2 measures)	LEG/FM3
City of Vista	Sales Tax	LEG
City of Wasco	Sales Tax	LEG
City of West Hollywood	Sales Tax (2 measures)	LEG/FM3
City of Westminster	Sales Tax (3 measures)	LEG/FM3
City of Wheatland	Sales Tax	LEG

Local Government Entity	Sales Tax/GO Bond/RPTT/Charter	LEG/FM3
City of Wildomar	Sales Tax	LEG/FM3
Yuba County	Sales Tax	LEG/FM3
City of Yucaipa	Sales Tax	LEG/FM3
Town of Yucca Valley	Sales Tax (4 measures)	LEG

### 3 CLIENT REFERENCES



**Mayor Ron Bernal**

Former City Manager

(925) 727-7958 (m)

[rbernal@ci.antioch.ca.us](mailto:rbernal@ci.antioch.ca.us)

In 2018, LEG/FM3 enacted a sales tax increase/renewal following two on-point baseline and tracking community surveys and a significant public outreach effort that engaged hundreds of residents.



**Charles McClendon**

City Manager

(760) 770-0387

[cmccclendon@cathedralcity.gov](mailto:cmccclendon@cathedralcity.gov)

The City of Cathedral City has been a joint LEG/FM3 client for nearly 20 years with multiple successful revenue measures to support the City's long-term fiscal sustainability vision, including a successful Charter City measure enacted in 2016 and three sales tax measures.



**Ed Shikada**

City Manager

(650) 329-2280

[ed.shikada@paloalto.gov](mailto:ed.shikada@paloalto.gov)

The City of Palo Alto has been a joint LEG/FM3 client for 20 years with multiple successful revenue measures to support the City's long-term fiscal sustainability vision, including a successful 2016 Library Bond, and 2022 Water Utility Transfer and Business License Tax. The City is currently a 2026 client for a Community Center Bond.

## 4 STRATEGIC CONSIDERATIONS

During our 2022 collaboration, LEG/FM3 found that your voters clearly viewed life in Hercules through a positive lens, with 56% of respondents saying the City was headed in the “right direction,” a significant increase from when LEG/FM3 started our collaboration with the City in 2012. Additionally, 52% of respondents felt the City was doing an “excellent” or “good” job providing services, by far the highest proportion in the first decade of our representation of the City. Your voters prioritized the following priorities, demonstrating concern about keeping Hercules stable, keeping taxpayer dollars local, and maintaining core programs such as 911 response, clean public areas, and safe parks:

- ✓ Maintaining long-term financial stability
- ✓ Preventing funds being taken by Sacramento
- ✓ Meeting water quality health standards
- ✓ Maintaining fiscal accountability
- ✓ Maintaining 911 response times
- ✓ Keeping public areas and parks safe and clean
- ✓ Keeping funds local

A lot has changed regionally and nationally since then. This is now a highly polarized environment, and many of our cities are already suffering from the effects of national policies that have impacted cost of living and the availability of funding that California cities receive. That’s why a careful, methodical assessment to determine the approaches that your public would like the City to take is so important in your upcoming planning. At the same time, the California Jarvis Taxpayers Association is seeking to qualify two state propositions for next November with an anti-government message. LEG/FM3’s ability to continue to track consistencies and changes in Hercules voter attitudes over time will be essential to navigating some of these dynamics in 2026.

## 5 SCOPE OF SERVICES – FM3

For this project, FM3 recommends conducting a dual-mode survey among likely November 2026 voters in the City of Hercules. As in 2022, by employing three different contact methods (telephone calls, email invitations, and text invitations) and two different data collection modes (telephone and online interviews), this approach provides a wide range of ways for voters to participate in the survey. As the City will recall, up to two measures can be tested comprehensively in one survey instrument. In 2022, those measures were the UUT Renewal and the combined Charter/RPTT Measure.

The research process will begin with an initial kickoff meeting between FM3, LEG, and the City’s project team, where we will review the City’s 2025-2026 goals, past research findings, and share consultant perspectives from the public audit we will have conducted in preparation for the project launch.

After the kickoff meeting, FM3 will draft and circulate the survey questionnaire prior to conducting a survey review call with the client team. For the baseline survey, we recommend an interview lasting approximately 20 minutes on average; for the tracking survey, we recommend a shorter 15-minute interview. As the City recalls, FM3 typically goes through several iterations of the survey questionnaire to ensure the instrument achieves the project’s objectives, is accurate, and meets any necessary legal requirements. Before moving to the data collection

phase, FM3 requires that all survey questionnaires be signed off as "final" by a client representative—which for ballot measure surveys must also involve sign-off by the City Attorney's Office—before being sent off for programming and any necessary translation. (This legal review is necessary specifically for any hypothetical 75-word ballot questions tested in the survey.) As we did in 2022, we recommend translating the telephone question into Spanish; we have found that people are less likely to respond to an online survey in a non-English language; therefore, online interviews will be offered in English only. We are happy to provide pricing and discuss offering telephone interviews in additional languages, such as Tagalog, upon request.

FM3 will then construct a sample by pulling a random list of voters from the voter file. To provide the most useful data for the City, we recommend aiming for a sample size of up to 400, which has a margin of error of  $\pm 4.9\%$  (at the 95% confidence level). As you may recall, we achieved approximately 350 completed interviews in 2022; in the case that we receive fewer than 400 completes this time around, we will prorate our costs to reflect the actual number of interviews received.

Based upon the final sample specifications, FM3 will set a target number of interviews to be completed online. We will then send a random selection of potential respondents either an email or a text message invitation containing a unique link (which can only be used once) inviting them to take the survey online. Within several days of the initial invitation distribution, we will examine the demographic and geographic characteristics of the online completes and then begin conducting telephone interviews to balance out the sample and target underrepresented subgroups.

Once the survey is complete, FM3 will present our preliminary survey findings—along with LEG's strategic recommendations—in a PowerPoint presentation to City staff. These results are typically presented in draft format to the client team—either in-person or via webinar—and further refined based upon feedback from that group. A final version of this presentation will be developed in a format suitable for FM3 to either present to the City Council or otherwise distribute to the public, depending upon the City's wishes.

Consistent with LEG/FM3's past Best Practices for the City of Hercules, FM3 considers the public PowerPoint presentation to be the final deliverable, with a memo summarizing key findings in a user-friendly format. As we have in the past, post-survey consulting will also be provided.

## **6 SCOPE OF SERVICES – LEG**

LEG's services can be summarized as follows:

1. Provide Lead Project Coordination
2. Engage the public around the City's 2026 Fiscal Sustainability Vision
3. Develop Outreach Plan, recommend ongoing Communications throughout the process
4. Assist with Ballot Measure Development/s if viable to proceed and conceive permissible post-Measure Communications content

### **6.1 Lead Project Services**

LEG continues to pride itself on a supportive, team-building approach with consistent planning sessions. With the input of all participants, LEG will develop meeting agendas and facilitate sessions to support the timely deployment of key project activities. As in our past Hercules projects, LEG/FM3's project launch will address:

- Overall project timeline and how all respective professionals will be executing on the City's behalf;
- Current City demographics and the wildcard dynamics of the current environment;
- The history of stakeholder views and opinions on the City's vision and how to build consensus; and
- LEG Best Practices in the types of measures contemplated by the City, including how other 2026 clients are approaching their bond measure planning, our 2024 experiences with RPTT measures, and recent lessons learned from our successful sales tax engagements.

### **6.2 Other LEG Services**

- Helping to navigate dynamic, evolving project needs and supporting City staff and other professionals to achieve a well-coordinated effort;
- Collaborating closely with FM3 on public opinion research needs and providing Strategic Recommendations and an Execution Plan;
- Creating strategies to continue to build on our past Hercules stakeholder and community engagement;
- Continuously updating and refining a Project Timeline, Activities, and Budget;
- Recommending permissible public education/information content for the City's Fiscal Sustainability vision;
- Re-training City staff on informational outreach message delivery, including how to respond to a variety of public and stakeholder questions, comments, or concerns;
- Developing earned/social media/web-based strategy and content for informational collateral;
- Providing Rapid Response services to support the City's PIO (without exception, LEG does not function as a paid spokesperson for its clients); and
- Adding value to staff reports to the City Council.

LEG continues to approach its partnership and Lead Consultant role with personal dedication, enthusiasm, and a commitment to excellent service, recognizing that our ultimate consumer is not only the City of Hercules, but most importantly, the constituents and stakeholders the City represents.

### **6.3 Public Engagement**

Following assessment of the City's updated 2025 FM3 opinion research, LEG will develop Strategic Recommendations and a plan. Consistent with our past practices, LEG will develop content copy for communications materials, the City website, and a PowerPoint presentation for informational or online Speakers' Bureau, Stakeholder, Key Influential, and community presentations.

### **6.4 Message Development**

Our project collaboration will have the goal of informing the public and raising awareness of the City's current quality of life vision and fiscal sustainability needs. "Message discipline" and a clear, concise focus are critical to project viability and effective outreach efforts.



## **6.5 Direct Mail/Social Media/Digital Media**

LEG continues to recommend a multi-faceted communications plan that will allow the City to raise awareness of City needs beyond stakeholders and key influentials, to a broader public. Your existing communications vehicles, such as your website, social media, and a Speakers' Bureau program (whether online or in-person) will all be utilized as they were in 2022.

As in our past collaborations, LEG will assist in drafting information or adding value for social media and advise the City on how to navigate independent or third-party sites such as blogs or Nextdoor.

In 2022, at LEG's recommendation and with the assent of the City Attorney, the City included paid digital as part of its informational communications toolkit, which we recommend again in 2025-2026.

## **6.6 Supporting Media Response and Maximizing Media Opportunities**

LEG will review earned (non-paid) media press opportunities with the City PIO. Balanced press coverage will build additional community and stakeholder engagement throughout the process, which is critical to informing the public about your needs. While LEG does not function as a spokesperson, we can support the City's communications efforts by developing additional content such as project-related press releases, media backgrounders, talking and rapid response needs, as necessary.

## **6.7 Ballot Measure Development/s and Post-Placement Communications**

Should the City's potential ballot measure/s be viable, LEG will collaborate with the City Attorney, City Clerk, and staff on ballot measure structure and wording to address public and stakeholder interests and priorities.

LEG will collaborate closely with the City Attorney's Office to refine the ballot question and add value to other ballot measure components so that they are understandable to the average person. This addresses specific documents such as the measure ordinance/s, ballot question/s, city resolution/s, and staff report/s to ensure that all voter handbook and related materials are understandable to the average person, not just lawyers.

Following placement of the measure/s on the ballot, LEG will recommend a Public Education approach that includes materials that address generational ways of receiving information. Towards this end, USPS mailings are still one component of a multi-disciplinary, cross-generational communications toolkit. LEG strongly advises an appropriate spectrum of communications, including paid digital. The City Attorney will review all recommended content including printed material and online copy.

## **7 SAMPLE THUMBNAIL TIMELINE**

Below and on the following pages is a Sample Thumbnail Timeline, which is similar in format to what we've used before in your City as an overview. Other 2026 clients are actively using a similar timeline. As in the past, LEG/FM3 will get the City's input on how the timeline should be tailored to your current vision/execution.

RECOMMENDED PROJECT SCHEDULE	
<b>OCTOBER 2025</b> (PRESUMED LAUNCH PER SCHEDULE IN CITY RFP)	<b>PHASE ONE: LAUNCH PROJECT</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Conduct project audit of past engagements with the City, current City demographics, budget/policy information, and media coverage</li> <li><input type="checkbox"/> Review current Best Practices in similar communities/projects</li> <li><input type="checkbox"/> Formalize consulting team partnership</li> <li><input type="checkbox"/> Convene Team Kick-Off Planning Meeting</li> <li><input type="checkbox"/> Develop/finalize updated Baseline Survey questionnaire</li> <li><input type="checkbox"/> Update Opinion Leader database and organizational hit list (City)</li> </ul>
<b>NOVEMBER- DECEMBER 2025</b>	<b>ASSESS VIABILITY</b> <p><u>November</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Field survey interviews week <i>following California Special Election</i></li> <li><input type="checkbox"/> Complete survey interviews prior to Thanksgiving</li> </ul> <p><u>December</u></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Analyze survey results and develop strategic recommendations</li> <li><input type="checkbox"/> Update staff and Council on viability</li> <li><input type="checkbox"/> Build out Engagement/Outreach Calendar for 2026</li> <li><input type="checkbox"/> Develop Informational Toolkit for 2026 Outreach</li> </ul>
<b>JANUARY 2026</b>	<b>LAUNCH COMMUNITY ENGAGEMENT</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Conduct Staff Message Training</li> <li><input type="checkbox"/> Implement initial round of community presentations (City)</li> <li><input type="checkbox"/> Issue Opinion Leader update #1</li> <li><input type="checkbox"/> Assess initial community responses, update toolkit as needed</li> </ul>
<b>FEBRUARY-MAY 2026</b>	<b>CONTINUE TO ENGAGE THE COMMUNITY AROUND COMMUNITY PRIORITIES; ADDRESS CHARTER REQUIREMENTS IF PROCEEDING WITH THAT MECHANISM</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Continue engagement (City)</li> <li><input type="checkbox"/> Issue additional Opinion Leader updates</li> <li><input type="checkbox"/> Continue to update City website and other communications vehicles (City) with updated informational budget process/engagement message points developed by LEG</li> <li><input type="checkbox"/> Continue to update answers for community questions</li> <li><input type="checkbox"/> Copywrite information for such sources as Earned Media/New Media/Social Media opportunities</li> <li><input type="checkbox"/> Conceive two informational mailings to solicit input and report back to the community (April and May)</li> <li><input type="checkbox"/> (If proceeding with a Charter/RPTT approach) Implement Public Hearing #1 (May)</li> <li><input type="checkbox"/> Implement paid digital media, advise on Media Strategy</li> </ul>
<b>JUNE -JULY 2026</b>	<b>RE-ASSESS VIABILITY, DEVELOP BALLOT MEASURE</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Develop and implement tracking survey if desired by City (must be implemented <i>following</i> California's June Primary)</li> <li><input type="checkbox"/> Analyze survey results</li> <li><input type="checkbox"/> (If proceeding with a Charter/RPTT approach) Implement Public Hearing #2 (June)</li> <li><input type="checkbox"/> If viable to proceed, assist with staff reports and preparation for chosen measure/s</li> </ul>

	<input type="checkbox"/> Assist in preparing for Council adoption vote <input type="checkbox"/> Media updates <input type="checkbox"/> Community participation <input type="checkbox"/> Address Rapid Response Needs as necessary
<b>AUGUST 2026</b>	<b>POST-ADOPTION MUNICIPAL ELECTION INFORMATION</b> <input type="checkbox"/> Update City's website and all communications vehicles with updated Measure content prepared by LEG <input type="checkbox"/> Issue final Opinion Leader Update with content prepared by LEG announcing placement of the measure/s on the ballot <input type="checkbox"/> Continue informational Speakers' Bureau presentations (City) <input type="checkbox"/> Implement Earned Media/Internet Communications  <i>The City of Hercules can continue its factual, informational efforts following placement of its measure/s on the ballot but cannot engage in any partisan activities.</i>
<b>SEPTEMBER-NOVEMBER 2026</b>	<input type="checkbox"/> Draft media and social media information <input type="checkbox"/> Issue three informational mailings <input type="checkbox"/> Implement second tranche of paid digital media <input type="checkbox"/> Address rapid response needs <input type="checkbox"/> Continue Informational Outreach (City) <input type="checkbox"/> Provide two-way media comments <input type="checkbox"/> Thank the community (City)

## 8 BUDGET

### 8.1 FM3's Survey Specifications and Proposed Costs

**Figure 5** contains the total estimated costs for a 20-minute baseline and a 15-minute tracking survey. These prices are comprehensive and include all costs for questionnaire design, sample acquisition and preparation, Spanish translation, programming, email and text invitations, survey hosting, bilingual (English and Spanish) telephone interviewing, data entry and analysis, and reporting. As previously mentioned, FM3 will do our best to obtain up to 400 interviews; if we receive fewer completes, we will prorate our costs. A sample size of 350 is provided to demonstrate what our costs will be if we receive the same number of interviews as we did in 2022.

**Figure 5: Survey Costs**

Survey Length	350 Interviews	400 Interviews
<b>15 minutes</b> (tracking)	\$28,750	\$30,250
<b>20 minutes</b> (baseline)	\$32,000	\$34,000

## 8.2 LEG's Proposed Professional Rate

LEG's 2025 professional consulting fee is \$6,750 per month. Based on our longstanding representation of the City, LEG is pleased to propose a discounted rate to the City of \$6,000 per month. Without exception—and consistent with our previous collaborations—LEG also does not invoice or track work on an hourly or time and materials basis.

Professional fees do not include hard project costs such as:

- Graphic design, printing, or postage for any mailed materials. In 2022 LEG drafted the content and provided a sample, and the City used its own vendors for design/printing/mailing data with a budget outside of the scope of our Agreement.
- Paid digital media costs are not included, as those services are performed by highly specialized vendors and the City also paid for those costs directly in 2022 outside of LEG/FM3's Agreement.
- Any additional legal costs necessary, or the County Registrar's election cost invoice.

## 8.3 Summary of Bid

LEG Lead Consultant Services (discounted rate October 2025–October 2026; 13 months): \$78,000

FM3 Polling (baseline and tracking survey): \$64,250

**Total Bid NTE: \$142,250**