

Attachment 1

**Proposed Workplan and Budget for the  
Local Transportation Sales Tax Measure Expenditure Plan  
Public Information Program**

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**1. COMMISSIONER AND STAFF SUPPORT MATERIALS**

- **Talking Points and Briefings** – For use by commissioners and staff to have accurate, up-to-date facts and communicate common themes regarding the Expenditure Plan. These materials can help ensure all representatives of the RTC are on the same page. Staff and consultant to produce and update as needed.

DIRECT COST: Part of current work program  
INDIRECT COST: RTC commissioners, staff and consultant time

- **Frequently Asked Questions (FAQ)** - An updated FAQ sheet can help RTC commissioners, staff and the public stay up-to-date on developments prior to the election and provide consistent answers to questions. This handout can be updated regularly (both in print and on the website) as new questions from the public are received and answered. Assumes a print run of 10,000, 2-sided copies on 24# colored bond, written and designed in-house by staff and consultant and printed at Kinko's or in the Commission office. To be distributed at all local meetings and speaking engagements of RTC commissioners and staff and updated as needed.

DIRECT COST: \$900  
INDIRECT COST: RTC commissioners, staff and consultant time

- **Fact Sheet** – This can be updated regularly (both in print and on the website) as needed. Assumes a print run of 10,000, 2-sided copies on 24# colored bond, written and designed in-house and printed at Kinko's. To be distributed at all local meetings and speaking engagements of RTC commissioners and staff. (Staff recommends expanding the fact sheet to be used as a printed mailer. Printing extra copies of the mailer would eliminate this in-house copying cost.)

DIRECT COST: Part of current work program  
INDIRECT COST: RTC commissioners, staff and consultant time

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**2. PRESS / MEDIA OUTREACH**

- **Press Releases** - Write and send to media releases with follow up calls to reporters to provide information on the elements of the Expenditure Plan or to do a series of articles. Staff to solicit coverage. Commissioners and staff to talk with press.

DIRECT COST: Part of current work program  
INDIRECT COST: RTC commissioners, staff and consultant time

**Public Service Announcements (PSAs)** – Staff to write and send PSAs to radio and TV stations to communicate the availability of the Expenditure Plan document and direct readers to how to obtain more information about the Expenditure Plan (on the website and from the Commission.)

DIRECT COST: Part of current work program

INDIRECT COST: RTC staff and consultant time

- **Editorial Boards** – Staff to contact and arrange meetings with Editorial Boards of local and some regional media regarding the Expenditure Plan elements. Commissioners and staff to meet with boards.

DIRECT COST: Part of current work program

INDIRECT COST: RTC commissioners and staff time

- **Press Kit** – Develop and print for the media (and Commissioners) to use as briefing materials. Include Fact Sheet, FAQ's and other informational documents as needed.

DIRECT COST: Part of current work program

INDIRECT COST: RTC staff and consultant time

- **Public Service / Affairs Shows** - Request to be on public service interview shows such as radio talk shows, TV Public Affairs program, etc. Staff to solicit appearances. Commissioners and staff to appear.

DIRECT COST: Part of current work program

INDIRECT COST: RTC commissioners and staff time

- **Meeting Broadcasts** – Schedule updates on the Expenditure Plan at meetings of the RTC that are televised.

DIRECT COST: Part of current work program

INDIRECT COST: RTC staff and consultant time

- **Paid Print Ads**– Buy small newspaper ads to communicate the availability of the Expenditure Plan document and direct readers to the RTC website. Ads would be written and designed in-house by staff and consultant. Estimates are based on the recent cost of placing ads for the Highway 1 Public Information Meetings held in Aptos and Live Oak in April 2004. Ads are approximately 6" x 6" and to be published as follows:

➤ Run twice in: Santa Cruz Sentinel, Register-Pajaronian, La Ganga (Spanish Language Weekly), Good Times, and Metro Santa Cruz

➤ Run once in: Aptos Times, Mid-County Post and Scotts Valley Banner/Valley Press.

DIRECT COST: \$4,040

INDIRECT COST: RTC staff and consultant time

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### **3. QUESTIONS & REQUESTS FOR INFORMATION**

- **Research and Respond** – Field community questions regarding projects, the financial plan and other aspects of the Expenditure Plan. These questions are likely to come in via the phone, the web and letters and will take a significant amount of staff time to answer and track. Frequently asked questions will be added to the FAQ handout.

DIRECT COST: Part of current work program  
INDIRECT COST: RTC staff and consultant time

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### **4. WEBSITE**

- **Updates** - Continue to update the website with FAQ's and other information that will keep interested people revisiting the website on a regular basis.

DIRECT COST: Part of current work program  
INDIRECT COST: RTC staff time

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### **5. PUBLIC EVENTS/ SPEAKING ENGAGEMENTS**

- Attend community events and meetings to speak and distribute Expenditure Plan fact sheet and FAQ. Commissioners and staff to attend.

DIRECT COST: Part of current work program  
INDIRECT COST: RTC commissioners and staff time

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### **6. DIRECT MAIL**

Currently, the number of Santa Cruz County households (residents who receive mail at street addresses and those who use post office boxes) is 107,380. In addition, there are 10,800 businesses countywide. The commission also maintains a list of 150 community groups. Combined, there are 118,330 recipients in these three groups. As of June 16, 2004 there were 134,760 registered voters countywide. In light of these numbers, it is more cost effective to mail to all households, businesses and groups than to mail to individual voters.

For the purposes of these direct mail estimates, costs are based on mailing printed pieces to all residential street addresses, postal box addresses, business addresses and the RTC's list of local community groups. Specific delivery addresses will be printed on all pieces of mail and they will be addressed to resident or occupant. This method allows for improved odds of delivery within the postal system rather than other types of saturation mail that do not include a preprinted address on each piece.

Businesses have been included in these estimates since many of them will be responsible for collecting and remitting the new sales tax. In addition, the sales tax may affect

consumers' perceptions about the price of merchandise being sold by local businesses. Therefore, the minimum print run required to complete a mailing that includes businesses countywide is 118,330 pieces.

**Flat/Catalog Size Mailer to All County Households, PO Boxes and Businesses**

Produce a printed mailer to reach out to the community with information regarding the Expenditure Plan. The timing of the mailer/public information piece would be to produce it as soon as possible to use at outreach events and then choose an appropriate time to mail it to County residents for the highest chance of being noticed and read. The impact on staff time could be fairly minimal as much of the information already exists and it would be a question of organizing the information and graphically designing an eye-catching brochure.

- Costs include design and printing of 130,000 copies of a 2-color piece 11" (h) x 17" (w) folded to 8 ½' x 11" on 80# coated text that could be used as a mailing, as a handout at meetings and as an insert in local publications.
- Costs include mailing preparation and third class postage for 118,330 pieces. Postage is based on a piece up to 3.3 oz.

DESIGN:	\$ 1,130
PRINTING:	9,350
MAILING PREP:	4,720
POSTAGE:	15,150

DIRECT COST:	\$30,350
INDIRECT COST:	RTC staff and consultant time

**Insert in Publications**

- A pre-printed brochure or fact sheet could be inserted in local weekly publications as another method of distribution. With a "shelf life" of an entire week and typically with few pre-printed inserts per issue, weeklies are an excellent communication vehicle. Both the cost of printing and insertion rates are included in this section.
- Costs are for one insertion only. Publications included in this estimate: Good Times, Metro Santa Cruz, Aptos Times, Capitola Times, Mid-County Post, and Scotts Valley Banner and Valley Press. Combined, the circulation of these publications is 146,000 readers.
- An extra 146,000 copies of the Flat/Catalog Size mailing piece would be printed as part of the mailer printing in order to benefit from the economy of scale.

INSERT COST:	\$ 5,500
PRINTING COST:	10,500
SHIPPING:	250

DIRECT COST:	\$16,250
INDIRECT COST:	RTC staff and consultant time

## **7. POST-ELECTION VOTER POLL: QUESTIONNAIRE DEVELOPMENT ONLY**

There has been a query about conducting a poll in the event the sales tax measure doesn't pass in November 2004. While resources to conduct a poll are not available within the constraints of the public information program, development and planning for a post election survey have been included in the recommended activities. In the event the poll is needed, additional resources to actually conduct the poll would need to be committed.

- POLL DEVELOPMENT: \$2,500 (poll development work prior to the election)
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### **ACTIVITIES CONSIDERED, BUT NOT RECOMMENDED AS PART OF PUBLIC INFORMATION PROGRAM WORKPLAN AND BUDGET:**

#### **Postcard Mailer to All Santa Cruz County Households, PO Boxes and Businesses**

- Produce a postcard that directs readers to the availability of the Expenditure Plan and to information posted on the RTC website.
- Costs include design and printing of 120,000 2-color postcards up to 5 7/8" x 11 1/2" in size
- Costs include mailing preparation and third class postage for 118,330 postcards. The remaining 1,670 pieces could be used as handouts at speaking engagements.

DESIGN:	\$ 750
PRINTING:	4,120
MAILING PREP:	4,720
POSTAGE:	14,200

DIRECT COST:	\$23,790
INDIRECT COST:	RTC staff and consultant time

Not recommended due to cost and limited amount of space in which to communicate information.

#### **Letter Size Mailer to All County Households, PO Boxes and Businesses**

- Produce a printed mailer to reach out to the community with information regarding the Expenditure Plan. The timing of the mailer/public information piece would be to produce it as soon as possible to use at outreach events and then choose an appropriate time to mail it to County residents for the highest chance of being noticed and read. The impact on staff time could be fairly minimal as much of the information already exists and it would be a question of organizing the information and graphically designing and eye-catching brochure.
- Costs include design and printing of 130,000 copies of an 8 1/2" x 11" 2-color piece. 118,330 pieces would be folded in half to a finished size of 5 1/2" x 8 1/2" for mailing

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purposes. The remainder 11,670 copies would be used as handouts at speaking engagements.

- Costs include mailing preparation and third class postage for 118,330 pieces folded to a 5 1/2" x 8 1/2" finished size and sealed with a tab sticker.

DESIGN: \$ 900  
PRINTING: 5,220  
MAILING PREP: 6,260  
POSTAGE: 14,200

DIRECT COST: \$26,580  
INDIRECT COST: RTC staff and consultant time

Not recommended due to size limitations. A larger piece than this one would be a better value offering more space for photos, graphs, charts, and information.

**Post Election Poll of Voters**

Two polling firms were consulted about conducting a post election poll of voters. Both recommended an immediate post-election phone poll to be conducted within the week following the election and that would run only if the measure failed. A phone poll ensures a sample that includes voters who voted in person as well as those who voted by mail.

**Poll Estimate #1**

- Could do a weighted sample of 600 voters (120 per supervisorial district) or a smaller random sample of 400 voters. Price range is \$15-18,000 for the larger sample and \$12-15,000 for the smaller sample. Questionnaire length about 8 to 9 minutes for a shorter poll and 10-11 minutes for a longer one. Cost depends on sample size and questionnaire length.
- Poll would determine that respondents voted, how they voted, the main reasons why they voted the way they did and demographic info. A lengthier poll could include questions to reveal what messages might have changed voters' minds about how they voted.

ESTIMATE #1:

POLL DEVELOPMENT: \$2,500 (recommended in Public Information Program)  
POLL IMPLEMENTATION: \$9,500 – 15,500 (depends on sample size and questionnaire length)  
TOTAL COST: \$12,000 to 18,000  
INDIRECT COST: RTC staff and consultant time

**Poll Estimate #2**

- Suggested sample size of 600 to get a good sample of yes votes and no votes to compare. Questionnaire length about 8 to 10 minutes. Cost depends on final questionnaire length. Could also save money by decreasing sample size. Might want to determine final sample size after seeing election results.

ESTIMATE #2

DIRECT COST: \$19,000 (depends on sample size and questionnaire length)

INDIRECT COST: RTC staff and consultant time

Due to funding constraints, the activity of conducting the poll is not recommended as part of Transportation Sales Tax Measure Public Information Program. However, additional resources could be identified and committed for this purpose.