

## Cover Letter and Executive Summary

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November 16, 2023

Arapahoe County  
RE: RFP 23-65

Thank you for the opportunity to bid for Strategic Consulting Services for Arapahoe County. This proposed scope of work includes the services outlined in the RFP, plus some additional communications and public engagement recommendations.

[Public Alignment Communication](#) will be the lead consultant, with strategic public opinion polling and data services provided by [Magellan Strategies](#) and public financing counsel provided by [Stifel](#). Not only does our collective team have many decades of experience with the type of work described in the scope of services, but our team members would each describe this scope as “exactly what we do.” Full experience and bios of all of our team members are included in the Addendum. Our proposal ensures that, by June 30, 2024, the greatest number of potential voters and stakeholders feel included in the decision making process and will understand the costs and benefits to the community of any potential new funding proposal and the alternatives.

Our proposed strategy, tactics, and timeline provides the public with ample time to understand and offer input on potential solutions to Arapahoe County’s fiscal challenges. It also allows leadership the necessary time to make a final determination regarding the best path forward based upon all of the feedback received during our proposed public engagement effort.

As you review the high level description of our recommended approach please keep in mind that we would work collaboratively with the interdisciplinary county staff team and finalize the plan based upon further discussion and input from county leadership. This model has been successful for numerous other local governments, including the City of Littleton, Grand County, and Telluride Hospital District, to name three recent examples. Our bid includes a maximum total amount depending upon further potential discussions with decision makers for Arapahoe County.

We appreciate your consideration,  
Public Alignment Communication, Magellan Strategies, and Stifel

## Details of Proposal Including Pricing

<p><b>Strategy and Planning: January 2024</b></p> <ul style="list-style-type: none"> <li>● As part of our planning process, we will review public opinion research previously conducted by Arapahoe County, especially the survey conducted in July 2023.             <ul style="list-style-type: none"> <li>○ This data will help inform initial messaging and the overarching strategic plan.</li> </ul> </li> <li>● Our team will meet with the interdisciplinary county staff team, the BOCC, elected officials, and key stakeholders to learn about work-to-date, current status, as well as provide strategic counsel and recommendations.             <ul style="list-style-type: none"> <li>○ Stifel will be a key partner in analyzing the financial information and estimates for potential revenue and expenditure scenarios/solutions including performance modeling; and can assist in the preparation of documents, rating agency strategies and presentation, marketing/selling financing, and the coordination of closing the financing.</li> </ul> </li> <li>● Based upon the County’s input we will develop a detailed communications and public engagement timeline (Gantt chart) for implementation February 1 to June 30, 2024.             <ul style="list-style-type: none"> <li>○ This Gantt chart will prioritize key communication and public engagement activities outlined below.</li> <li>○ This strategic approach is designed to develop preferred proposed solutions based upon informed public input.</li> </ul> </li> </ul>	<p><b>\$7,500</b></p>
<p><b>Community and Stakeholder Outreach/Input: February 2024</b></p> <ul style="list-style-type: none"> <li>● With input from County leadership and in partnership with Magellan Strategies and Stifel, we will identify potential policy solutions and alternatives as well as potential messaging and facts to test in a statistically valid poll of likely voters fielded by Magellan Strategies.             <ul style="list-style-type: none"> <li>○ Message segmentation will be developed based upon localized demographic data.</li> <li>○ We recommend conducting 600 interviews and asking 25 to 30 questions inviting likely voters via MMS text message to participate in a digital survey.                 <ul style="list-style-type: none"> <li>▪ Additional survey methods/pricing options, record of success, and further background are included in the Addendum under Public Opinion Research.</li> </ul> </li> <li>○ Results will be presented in a slide deck and used to develop all educational material to be used in external communications.</li> <li>○ This survey would be very different from past polls we have seen including the July 2023 poll.</li> </ul> </li> </ul>	<p><b>\$29,500</b></p>

<ul style="list-style-type: none"> <li>● With input from County leadership, we will identify and interview up to 30 community stakeholders and keep them informed of the potential proposed solutions during the January-June 2024 timeframe. <ul style="list-style-type: none"> <li>○ Opportunities for coalition building and grassroots education will be identified and recommendations made to optimize educational efforts.</li> </ul> </li> </ul>	
<p><b>Public Engagement and Education: March – April 2024</b></p> <p>During this timeframe, we will prioritize strategies to gather input on priorities from residents to help the County determine next steps. This will include:</p> <ul style="list-style-type: none"> <li>● A data-driven messaging rubric to be used as a basis for all communication.</li> <li>● Printable and digital one-page fact sheet and FAQs.</li> <li>● A dedicated and interactive website using the <a href="#">Social Pinpoint</a> platform. This digital and virtual public engagement tool will replace in-person public meetings, as interest and attendance has not returned to pre-pandemic levels. We will be able to: <ul style="list-style-type: none"> <li>○ Drive public interest and input to this single website/platform, providing a user-friendly experience for busy citizens and giving county leaders a clear and streamlined public input process.</li> <li>○ Gather input via myriad tools from a much broader and more diverse sector of the population, to include funding prioritization, conversations, Q&amp;A, quick polling, and more. The public will become more educated on the challenges and potential policy and revenue options.</li> <li>○ Brand the platform with an easy to remember (redirecting) URL.</li> </ul> </li> </ul> <p><b>Promotion of Public Engagement Opportunities</b></p> <p>We will promote this virtual engagement platform broadly via an omni-channel marketing and outreach mix to include:</p> <ul style="list-style-type: none"> <li>● Four social media posts.</li> <li>● Two print ads (1x monthly) in local community newspapers.</li> <li>● Two weeks of geo-targeted banner ads on 9News.com.</li> <li>● Two weeks of geo-targeted display ads (10 and 15 second videos and static banners to run on Google and YouTube).</li> <li>● Outdoor advertising, such as billboards, transit shelters, and bus boards.</li> <li>● Mail and other collateral based upon the budget (we typically include mail in our communication tactics but can discuss the cost/benefit with leadership).</li> <li>● Articles and content for municipal newsletters and publications (the News Aurora water bill insert and the Littleton Report, for example).</li> <li>● Targeted sponsorships and paid advertising for eastern communities.</li> <li>● Presentation deck that includes a summary analysis of the status quo and potential policy/revenue options for community, civic, business, and</li> </ul>	<p><b>\$23,750</b></p> <p><b>Up to \$25,000*</b></p>

<p>municipal stakeholders. We will work with County leadership to calendar opportunities to present and further educate the community.</p> <ul style="list-style-type: none"> <li>• Communications and media relations counsel to ensure message coordination.</li> </ul>	
<p><b>Public Outreach and Education: May - June 2024</b></p> <p>Once we've gathered and quantified substantial feedback from the public we will communicate the insights and findings broadly. This transparent process helps build trust with the public. Over the course of two months, we will generate the following content for review and approval. Once content is finalized, we will manage professional design, printing, production, and distribution.</p> <ul style="list-style-type: none"> <li>• Regular updates to the Social Pinpoint website (e.g. ongoing conversations with the community and pulse polls).</li> <li>• Three ads (1x monthly) in local community newspapers.</li> <li>• Four to six weeks of geo-targeted banner ads on 9News.com.</li> <li>• Bus shelter ads throughout the County.</li> <li>• Geo-targeted display ads (10 and 15 second video ads and static banners to run on Google and YouTube).</li> <li>• Six (2x monthly) social media posts and corresponding graphics</li> <li>• Articles and content for municipal newsletters and publications (the News Aurora water bill insert and the Littleton Report, for example).</li> <li>• Postcards delivered by mail to all households with at least one registered voter.</li> </ul>	<p><b>Up to \$55,000*</b></p>
<p><b>Potential Ballot Question Poll: June 2024</b></p> <p>Fielding a brief poll to test potential ballot language based upon all of the public feedback we will have received is a helpful method to determine whether County leadership should consider placing a question on the November ballot.</p> <ul style="list-style-type: none"> <li>• A statistically-validated poll will be weighted to match the anticipated voter turnout for the November 2024 election. Based on those results our team will provide our recommendation to the County on what the chances of success might be for a potential ballot question.</li> <li>• Providing recommendations on any proposed ballot language is something we work with our clients' legal counsel on. Typically, a lawyer provides an initial draft of the ballot language and we provide recommended edits.</li> </ul>	<p><b>\$15,500</b></p>
<p><b>TOTAL**</b></p>	<p><b>Up to \$156,250</b></p>

\* Costs for promotion vary widely and we would work with County leadership to determine the most cost effective approach, including translations and bilingual content.

\*\* This amount includes \$81,250 in potential promotional costs.



**ARAPAHOE COUNTY**

**Arapahoe County Finance Department  
Purchasing Division  
5334 South Prince Street, Room 480  
Littleton, Colorado 80120**

**REQUEST FOR PROPOSAL  
REQUIRED SUBMITTAL FORM**

**SUBMITTED BY:**

Company Name: Public Alignment Communication LLC


Contact Names: Sales/Customer Service: Bryan-David Blakely

Address: 1312 17th Street #2544 Denver CO 80202

Phone: ( 720 ) 939-0480 Email(s): bryandavid@publicalignment.com

The undersigned hereby affirms that:

- He/she is a duly authorized agent of the vendor;
- He/she has read all Terms and Conditions and technical specifications made available in conjunction with this solicitation and fully accepts and acknowledges this offer is consistent with the specifications and terms and conditions, unless specific variations have been clearly and expressly listed in the offer.
- The Offer is in all respects fair, without outside collusion or otherwise illegal action.

By <u></u>	<u>11/15/2023</u>	<u>81-4611374</u>
Signature of Authorized Agent	Date	FEIN

<u>Bryan-David Blakely</u>	<u>Managing Partner</u>	<u>bryandavid@publicalignment.com</u>
Typed/Printed Name of Agent	Title of Agent	Agent email

**PAYMENT TERMS:** If the vendor does not accept a percentage discount, the County standard is net thirty (30) days after the date that the County receives an accurate invoice and has accepted the product or service. Payment is the date of the check mailing or date of the credit card transaction.

Discount: 0 %      Days, Net: 30 Days, Accept Visa without additional fee? No

**VARIATIONS:** The vendor shall identify all variations and exceptions to any RFP documents. Submittal of a Vendor Contract is considered excessive in Variations and may be cause for determining that the Bid/Offer is non-responsive and ineligible for award. For each variation listed, reference the applicable section of the solicitation document as per the example below. If no variations are listed here, it is understood that the vendor's Offer fully complies with all terms and conditions. Attach additional Variation sheets in the same format as below.

Page #:      Item # or Section:      Variance

**SUBMITTAL INSTRUCTIONS:**

Proposals shall be submitted in the order listed below with each section clearly identified.

- ✓ Submit questions and submittal ON-LINE at BidnetDirect.com before deadlines
- ✓ Cover & Executive Summary. Detail Firm's and employees' Capabilities, Experience & Licensing
- ✓ Details of Proposal – Proposed products & services, implementation timeline and warranties.
- ✓ Completed Submittal Forms including this sheet and all other attachments specifically requested including a Performance Measures Form when requested.
- ✓ Required Documentation – Provide documentation that satisfies the request.
- ✓ Pricing – All fee and costs associated with the proposal.
- ✓ Insurance – Checking this box accepts that the insurance requirements listed by the County are acceptable unless listed in the variations on the previous page.
- ✓ CONFIDENTIAL information, if any, MUST be stamped as such on each page and submitted separately.
- ✓ Please initial to acknowledge Addenda, if any, have been considered in your proposal:

#1 BDB #2 \_\_\_\_\_ #3 \_\_\_\_\_ #4 \_\_\_\_\_ #5 \_\_\_\_\_

**REFERENCES:**

- Check here if Firm's standard reference sheet is attached, otherwise, use the space below.

Name: City of Littleton Contact Person: Kelli Narde

Address: 2255 W. Berry Ave Littleton CO 80120

Telephone No: 303-975-3733 Email: knarde@littletongov.org

Describe type of work/service performed or items supplied: Public engagement for potential ballot question regarding sales tax increase.

Name: Telluride Hospital District Contact Person: Dr. Diana Koelliker

Address: 500 W. Pacific Ave Telluride CO 81435

Telephone No: 970-728-9782 Email: dkoelliker@tellmed.org

Describe type of work/service performed or items supplied: Public engagement for potential ballot question regarding property tax increase.

Name: Inter-Canyon Fire Protection District Contact Person: Skip Shirlaw

Address: 7939 S Turkey Creek Rd Morrison CO 80465

Telephone No: 303-697-4413 Email: sshirlaw@icfpd.net

Describe type of work/service performed or items supplied: Public engagement for potential ballot question regarding property tax increase.

**Arapahoe County must have on file a completed W-9 prior to doing business with contractors.**

## Fee Schedule

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Public Alignment Communication will not charge a monthly retainer but will invoice at the end of each month for the services provided according to the timeline as described above and based upon County approval.

The identified/unknown tactics for further discussion and consideration are related to promotion and advertising as identified above and the final budgeted amount will be based upon further potential discussions with the County.

# Liability Insurance



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
11/14/2023

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

<b>PRODUCER</b> The Ahbe Group 7167 S Alton Way  Centennial CO 80112  <b>INSURED</b> Public Alignment 1312 17th St #2544  DENVER CO 80202	<b>CONTACT NAME:</b> Brendan Healey <b>PHONE (A/C, No, Ext):</b> (303) 995-0413 <b>FAX (A/C, No):</b> (303) 732-6291 <b>E-MAIL ADDRESS:</b> Brendan@healeyins.com  <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 70%; text-align: center;"><b>INSURER(S) AFFORDING COVERAGE</b></td> <td style="width: 30%; text-align: center;"><b>NAIC #</b></td> </tr> <tr> <td><b>INSURER A:</b> Continental Casualty Company</td> <td style="text-align: center;">20443</td> </tr> <tr> <td><b>INSURER B:</b> RLI</td> <td style="text-align: center;">13056</td> </tr> <tr> <td><b>INSURER C:</b></td> <td></td> </tr> <tr> <td><b>INSURER D:</b></td> <td></td> </tr> <tr> <td><b>INSURER E:</b></td> <td></td> </tr> <tr> <td><b>INSURER F:</b></td> <td></td> </tr> </table>	<b>INSURER(S) AFFORDING COVERAGE</b>	<b>NAIC #</b>	<b>INSURER A:</b> Continental Casualty Company	20443	<b>INSURER B:</b> RLI	13056	<b>INSURER C:</b>		<b>INSURER D:</b>		<b>INSURER E:</b>		<b>INSURER F:</b>	
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<b>INSURER F:</b>															

**COVERAGES      CERTIFICATE NUMBER: CL2322155973      REVISION NUMBER:**

**THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.**

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			6021362608	12/20/2022	12/20/2023	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000 BAIL \$ 1,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			6021362608	12/20/2022	12/20/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED    RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
B	Professional Liability			RTP0027631	12/27/2022	12/27/2023	Each Claim \$2,000,000 Aggregate \$2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

<b>CERTIFICATE HOLDER</b>  Arapahoe County 5334 S. Prince St Littleton, CO 80120	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE Brendan Healey/HEALEY <i>Brendan Healey</i>
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ACORD 25 (2014/01)  
INS025 (201401)

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# ADDENDUM

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## Professional Bios

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### Public Alignment Communication - Lead Consultant

Public Alignment Communication was established in 2016 with the goal of becoming trusted advisors to our clients and experts in their issues as we navigate complex projects with their constituents together. Our approach is shaped by decades of experience using research and audience insights to inform messaging and issue-based education campaigns. Whether it's community development, emergency services, education, infrastructure, health, or housing, you'd be hard-pressed to find an issue we haven't worked on.

Our well-rounded team has experience in the following sectors: special districts, local and state government, community nonprofits, foundations, member-based advocacy organizations, academia, and the private sector. And we have established relationships with professional designers, developers, and print/mail houses to ensure the highest quality production and delivery.

#### **PUBLIC ALIGNMENT COMMUNICATION TEAM BIOS**

##### **Bryan-David López Blakely, Managing Partner**

Bryan-David has over 22 years of experience in strategic advocacy, local government, and public engagement. He has managed campaigns, organized coalitions, and developed strategies for clients leading to successful ballot initiatives, policy changes, increased public support, and approvals for community development and infrastructure projects. He loves providing effective strategies, creative ideas, and community engagement support to make positive change! Bryan-David holds a master's degree in international affairs with an emphasis on conflict resolution and development from the George Washington University.

##### **Sara O'Keefe, Managing Partner**

Sara O'Keefe has over 22 years of experience developing and implementing communication and outreach strategies that engage communities and stakeholders in critical social, economic, and policy discussions and decisions. She is an expert in positioning and message strategy and has led such efforts for multi-million dollar education and policy campaigns. Her clients look to her for thoughtful advice on relating to and communicating with their constituents and stakeholders in the most effective way. Sara holds a master's degree in political science with an emphasis in state and local policy from the University of Colorado – Denver.

## Marisela Calderón, Communication + Outreach Strategist

Marisela Calderón has over seven years of experience developing and implementing marketing and communication campaigns. Her diverse background spans branding, digital campaigns, social media, content strategy, and community relations. Marisela previously worked for a fast-growing start-up, where she crafted the company's brand and led grassroots campaigns engaging with local communities. Marisela's passion lies in helping organizations communicate their story, reach their objectives, and make an impact. Marisela holds a master's in marketing and public relations from the University of Denver.

## Recent Case Studies

### **The City of Littleton**

Public Alignment Communication helped the City of Littleton pass four ballot questions, including the first sales tax in 50 years. We started with 37% of likely voters' awareness of where things often begin. Our team developed a five-month plan for successfully passing a ballot question for a .75% sales tax rate increase with 59% support. One year later, we helped pass a new 5% lodging tax with 64% support to generate about \$1 million annually for city-wide public arts and cultural facilities and programs.

### **Grand County EMS**

Grand County EMS was facing challenges due to increasing demand, rising costs, and limited revenue. Working closely with the County Commissioners, they aimed to put a 1.75 mill property tax increase on the ballot in a largely conservative county. Our strategic messaging and community outreach plan helped the measure succeed with over 51% of the vote – and that's with two additional property tax increases on the same ballot.

### **Telluride Hospital District**

Telluride Regional Medical Center (managed by the Telluride Hospital District) was facing a \$1.4 financial shortfall due to rising operational costs and declining insurance reimbursements. As the region's only 24-hour emergency and trauma department, the Telluride Regional Medical Center put a 3.25 mill levy increase on the ballot to avoid impacting local healthcare. Our team developed a communication plan that helped the ballot issue succeed with over 65% of the vote.

## Public Opinion Research - Magellan Strategies

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Magellan Strategies is a public opinion research firm specializing in measuring and understanding resident and voter opinion. We have conducted opinion research projects for Colorado governments, school districts, special districts (metro, library, fire, recreation), and public policy groups since 2007. We are also proud members of the Colorado City and County Management Association and Colorado Counties, Inc. You can learn more about our firm by visiting our website, [www.MagellanStrategies.com](http://www.MagellanStrategies.com).

Our team has extensive experience managing hundreds of opinion research projects measuring voter support and opposition for a wide array of ballot measures. We appreciate the opportunity to submit this proposal for public opinion research services to Arapahoe County.

### The Magellan Strategies Resident and Voter Opinion Survey Difference

A well-managed, engaging voter opinion survey is an indispensable investment that government organizations should embrace when considering a ballot measure that raises taxes to fund public services or projects. Statistically accurate and demographically representative voter opinion data ensures confident decision-making for staff and elected officials. In addition, a high-quality, engaging ballot measure survey process like ours provides local governments with other benefits, including: An opportunity to strengthen a government's brand and image rating by asking voters to share their thoughts and opinions on the ballot measure and other government services, issues, and initiatives.

An opportunity to educate, inform, and tell voters a story about why additional funding is needed for a government service, project, or initiative. This includes the ability to share images with respondents. This survey attribute will be very beneficial considering Arapahoe County's intent to share county budget information with respondents. The survey is a perfect opportunity to demonstrate to voters their county government is fiscally responsible and spends taxpayer money wisely. This is achieved by educating respondents with very specific information about government services and project costs and expenditures. It will show your community you have counted every penny. The survey is a direct public communication to your community. You will have their undivided attention. Therefore, be sure to let them know no decisions have been made, and their honest responses, thoughts, and opinions will determine if the ballot measure moves forward or not. When choosing an opinion research firm, government staff and elected officials should be aware of the different survey data collection methods and resident databases utilized to complete a ballot measure survey process. Magellan Strategies embraces modern data collection methods by using MMS text message invitations and by utilizing current, enhanced voter databases. These methods produce a more engaging ballot measure survey than a traditional phone-only survey.

Simply put, our survey data collection approach and respondent engagement process will interview more voters, including hard-to-reach populations, than other opinion research firms using “phone-only” methods. Furthermore, our high-quality surveys with larger, more diverse sample sizes deliver more value to governments at a similar or lower cost than our competitors. Moreover, our online platform provides respondents with a survey experience that is inclusive, informative, and pleasant.

### [The Magellan Strategies Ballot Survey Process](#)

We pride ourselves on the fact that our ballot measure survey process always generates a large number of diverse, completed interviews. This is not a claim we make lightly. One aspect of a statistically valid and representative survey is providing respondents with multiple opportunities to participate. We achieve this goal by implementing two survey data collection methods. The first method sends multiple MMS text (text with an image and message) survey invitations to at least 50% of a community’s adult population.

The second data collection method uses government email databases and social media channels to raise voter awareness. In addition, we generate survey QR codes that can be posted and distributed in government buildings and public areas. These two data collection methods will engage a much larger percentage of voters than relying upon phone data collection methods.

### [Participate in Three Successful Ballot Measure Survey Projects](#)

As a proof of concept, the following are survey links and QR codes for some of our successful ballot measure survey projects for the City of Englewood, the City of Fountain, and the Fraser River Valley Housing Authority. Each survey accurately forecasted voter support and opposition levels. More importantly, these surveys included robust message testing and storytelling. This survey approach educated and informed respondents of the reasons why their local government needed additional revenue sources to provide valuable services. We intend to apply the same approach to the Arapahoe County survey project.

#### [Englewood 0.1% Sales Tax Ballot Measure for Alternative Policing](#)

This 2022 ballot measure survey included 29 questions and interviewed 887 likely voters in the City of Englewood. In addition to measuring voter support and opposition for three ballot measures, the survey educated respondents about the cost of providing alternative policing initiatives to be funded if the ballot measures were approved.

#### [City of Fountain 6.2 Mill Public Safety Ballot Measure Survey](#)

This 2022 public safety ballot measure survey included 30 questions and interviewed 853 likely voters in the City of Fountain. Our team was hired after the city’s 2021 public safety ballot

measure was soundly rejected in 2021. We crafted messages significantly more specific than what the City had been using in their 2021 campaign. This improvement resulted in voter approval of 55% in a very conservative and tax-resistant community.

[Fraser River Valley Housing Authority 2 Mill Ballot Measure Survey](#)

This 2022 ballot measure survey project provided crucial opinion data to establish a dedicated funding source for affordable housing programs and initiatives in the Fraser River Valley. (Winter Park, Towns of Fraser, Granby, Tabernash, and unincorporated Grand County).

[Magellan Strategies 2022 Ballot Measure Track Record](#)

In addition, to experience with message testing, we believe an opinion research firm should be evaluated based on how well they have forecasted voter support and opposition for past ballot measure research projects. Following is our ballot measure track record from some of our 2022 election cycle survey projects.



**2022 BALLOT MEASURE SURVEY PROJECTS**

	Magellan Forecast	Actual Yes Result	Difference
Boulder Valley School District Bond Measure	64%	68%	4%
City of Englewood 0.1% Sales Tax for Alternative Police	62%	62%	0%
City of Fountain 6 Mill Increase for Public Safety	57%	55%	2%
Fraser River Valley Housing Partnership 2 Mill Increase for Affordable Housing	54%	57%	3%
Ridgway Fire Protection District Sales Tax Increase for Operations	77%	73%	4%
Weld County RE-4 School District Mill Levy Override for Operations	53%	55%	2%
City of Boulder Climate Tax Revised Climate Tax	72%	70%	2%
Town of Windsor Open Space Acquisition 0.25% Sales Tax	54%	58%	4%

On average, our ballot measure survey projects take about 30 days to complete from start to finish. However, we can complete a survey project in less than 30 days if the client is in a rush to meet a deadline. The questionnaire design phase tends to take the most time to complete, as well as, the survey data collection phase. The following table shows each survey phase and the number of days to complete it.

[Survey pricing for projects with a range of sample sizes and questions](#)

800 Interviews, MMS Text/Telephone Hybrid Survey Pricing

35 to 40 questions, 16-minute phone survey (700 texts, 100 phones)..... \$27,500  
 25 to 34 questions, 14-minute phone survey (700 texts, 100 phones)..... \$25,000  
 20 to 24 questions, 12-minute phone survey (700 texts, 100 phone).....\$22,500

600 Interviews, MMS Text/Telephone Hybrid Survey Pricing  
 35 to 40 questions, 16-minute phone survey (525 texts, 75 phones) .....\$22,000  
 25 to 34 questions, 14-minute phone survey (525 texts, 75 phones) .....\$20,000  
 20 to 24 questions, 12-minute phone survey (525 texts, 75 phones).....\$18,000

MMS Text Message Only Survey Pricing  
 600 interviews, 25 to 30 questions..... \$17,500

**Magellan Survey Project References and Team Biographies**

**City of Englewood, 2022**

For this survey project, we measured voter support and opposition for three ballot measures. One ballot measure increased funding for road maintenance and repair. Another ballot measure funded the hiring of police officers and public safety staff. The third ballot measure funded alternative police and social justice personnel. Our survey accurately measured support for the road ballot measure and the alternative police ballot measure.

City Manager Shawn Lewis  
 SLewis@EnglewoodCO.gov | 303-762-2310

**City of Fountain Public Safety Ballot Measure Survey, 2022**

For this project, we surveyed 853 registered voters. We measured voter support and opposition for a 6.2 mill property tax increase to generate a \$1.7 million annual dedicated funding source for city police, fire, and EMS services.

City Manager Scott Trainor  
 strainor@fountaincolorado.org  
 Deputy City Manager John Trylch  
 jtrylch@fountaincolorado.org | 719-322-2000

**Fraser River Valley Housing Authority Survey, 2022**

For this project, we managed a survey measuring voter support and opposition for a 2-mill increase to create a dedicated funding source for the Fraser River Valley Housing Authority.

Town of Winter Park Manager Keith Riesberg  
 KRiesberg@wpgov.com  
 Assistant Town Manager Alisha Janes  
 AJanes@wpgov.com | 970-726-8081

## MAGELLAN TEAM BIOS

### David Flaherty, CEO and Founder

David Flaherty is the CEO and founder of Magellan Strategies. David has spent his 31-year career designing and conducting hundreds of survey research projects measuring resident 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 for political organizations and the U.S. House of Representatives (Subcommittee on the Census). Since 2007, David has led Magellan's growth into providing high-quality, professional survey research services to local governments, school districts, special districts, and public policy organizations. He is very proud to have helped more than 100 Colorado governments 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 active skier, golfer, mountain biker, and avid reader of political history.

### Courtney Sievers, MPA, Director of Survey Research

Courtney Sievers is the Director of Survey Research and has been with Magellan Strategies since 2009. Courtney is the point person for many of our ballot measure and policy survey research projects. In addition, Courtney has managed hundreds of our resident and voter opinion research projects in more than 20 states. In addition, she is an expert in SPSS, Uncle, and R. She also has extensive experience with focus group projects, 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 of Public Administration Degree from the University of Colorado Denver. Courtney is a native of Fruita, Colorado. She and her husband, Jake, live with their daughter Riley in Arvada. In her spare time, she loves to play soccer and ski.

### Ryan Winger, Polling Project Manager and Ballot Measure Strategist

Ryan Winger is a polling project manager and our Director of Survey Data Analysis. He has been with Magellan Strategies since 2007 and wears several "hats" in the firm. Ryan manages most of our school district and community survey projects. He also manages all of our Colorado resident and voter registration databases. Ryan is also an experienced local ballot measure campaign consultant. He is an expert in Facebook and "IP targeting" advertising strategies to help school districts, government, and special district clients run more effective ballot measure campaigns. Ryan is a graduate of the University of Colorado with a degree in Political Science. He resides in Frederick 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.



## Public Finance - Stifel

Stifel Lead Managed Negotiated Financings by Year and Rank		
Year	Number of Issues	Rank*
2022	729	1 <sup>st</sup>
2021	1,031	1 <sup>st</sup>
2020	929	1 <sup>st</sup>
2019	803	1 <sup>st</sup>
2018	536	1 <sup>st</sup>
2017	854	1 <sup>st</sup>
2016	801	1 <sup>st</sup>
2015	889	1 <sup>st</sup>
2014	592	1 <sup>st</sup>

\*rank by number of transactions

**Firm Ownership and Organizational Structure.** Founded in 1890 and incorporated in 1900, Stifel Nicolaus & Company, Incorporated (“Stifel”) is a wholly-owned subsidiary of Stifel Financial Corp., an **independent** publicly traded full-service broker-dealer with a specialization in municipal finance. Stifel has been underwriting municipal bonds in the state of Colorado since 1960. Stifel’s Colorado roots date back to 1927, when Edward A. Hanifen established the investment banking firm E.A. Hanifen in the Denver community; in 2000, Hanifen, Imhoff merged with Stifel. Public Finance is a core line of business, and Stifel has dramatically expanded the scope of its public finance practice in recent years. While other firms are exiting the municipal bond business, Stifel continues to invest in and grow its municipal bond business through organic growth and strategic acquisitions. **In 2022, for the ninth consecutive year,**

**Stifel ranked as the #1 underwriter nationally, serving as sole or senior manager on 729 negotiated municipal bond issues, pricing more than one in every ten issues in the nation. Stifel has retained its #1 ranking through the first three quarters of 2023, serving as sole or senior manager on 434 negotiated municipal bond issues in that time.** Stifel’s growth to becoming the #1 ranked underwriting firm in the industry (by transaction volume) is a reflection of our ability to deliver more balanced distribution than our Wall Street competition and broader distribution than our regional bank competition.

**Large Denver-Based Banking, Sales and Underwriting Public Finance Presence.** Stifel continues to excel in its underwriting activities, as a market leader both nationally and within the state of Colorado. Stifel remains one of the few investment firms within Colorado to perform underwriting, including all banking sales and trading activities **from Colorado**, in addition to having the firm’s lead underwriter Mike Imhoff located within our Denver office. As a consistent participant in the Colorado marketplace, Stifel is able to provide up to date information to our underwriting clients at a moment’s notice and market insights that out-of-state firms cannot. With active, daily participation in the municipal market and one of the largest trading desks in Colorado, Stifel is well advised of investor preferences regarding price and structure.

**Direct Experience with Colorado Issuers.** The Stifel team assigned to the County has extensive experience serving Colorado municipalities. Since January 2019, Stifel has served as underwriter on 280 Colorado transactions for total par amount of \$13.3 billion. These transactions provided important funding for a variety of municipalities throughout Colorado, including counties, cities, towns, school districts, fire districts, park and recreation districts, and water/wastewater providers, among others. In addition, a number of these financings were done following a successful election. With over 100 years of experience in Colorado, the Stifel team proposed to the County is well versed in issues surrounding TABOR and other funding challenges for municipalities in Colorado.

**Experience Leading Recent Colorado County Financings.** Stifel’s team has experience underwriting a broad array of Colorado county credits, including the following recent Colorado County financings:

- Otero County – Sole Manager – \$14.87 million Certificates of Participation, Series 2022
- Fremont County – Sole Manager – \$11.68 million Certificates of Participation, Series 2021
- Chaffee County – Sole Manager – \$8.265 million Certificates of Participation, Series 2021
- Moffat County – Sole Manager – \$21.635 million Certificates of Participation, Series 2021
- City and County of Denver – Co-Manager – \$273.83 million Dedicated Tax Revenue Bonds, Series 2021A
- Pitkin County – Sole Manager – \$20.00 million General Obligation Bonds, Series 2020
- Pitkin County – Sole Manager – \$4.455 million Sales Tax Revenue Bonds, Series 2020
- El Paso County – Sole Manager – \$34.455 million Certificates of Participation, Series 2020
- Larimer County – Sole Manager – \$71.485 million Certificates of Participation, Series 2020

Stifel Retail Sales Force at a Glance	
Retail Sales Professionals	2,418
Retail Sales Offices	385
Private Client Accounts	1.9 million
Private Client Assets Under Management	\$331 billion

**National Institutional Distribution through Regional Coverage.** Stifel clients benefit from one of the largest institutional salesforces in the securities industry. Our robust institutional team includes over 200 global fixed income salespeople, with 20 exclusively dedicated to municipal securities, and 80+ traders to ensure coverage of major national institutional accounts

as well as smaller local and regional institutional investors. This includes smaller money managers, banks, and insurance companies. Stifel’s institutional sales force is comparable in size or larger than the conventional New York wire houses. The institutional fixed income sales group maintains active relationships with over 4,000 accounts. An important distinction from our competitors is the regional locations of our institutional investment brokers. Stifel maintains institutional sales offices in both national and regional financial centers across the country, including: Boston, Chicago, **Denver**, Memphis, Minneapolis, New York City, Philadelphia, Phoenix, Pittsburgh, Richmond, San Antonio, St. Louis, and San Francisco.

**Lowering Rates with Retail Distribution.** Nationwide, Stifel maintains a retail brokerage force of more than 2,400 advisors in 385 offices managing over 1.9 million client accounts with more than \$331 billion in assets, including \$22.1 billion of municipal assets. **Within Colorado, Stifel has 33 advisors in 7 offices managing over 29,744 account with more than \$4.38 billion in assets, including \$329 million of municipal assets.** It is important to point out that this network is true in-house retail accounts and we do not use distribution agreements to reach this segment of the market. Retail buyers can provide an additive advantage to institutional investors for the County’s pricing process, as these investors tend to be more credit-focused than price-focused compared to institutional buyers. **Offering bonds locally provides residents of the participating entities a sense of engagement in supporting the County’s endeavors and may result in lower yields.**

## STIFEL TEAM BIOS

### Alan Matlosz, Managing Director

In Alan Matlosz's 30 years of experience in public finance banking, he has worked with a variety of counties, municipalities and special districts and has financed over 500 projects in Colorado. He has worked as underwriter or advisor to 30 of Colorado's 64 counties and has been an associate member of Colorado Counties, Inc. since 1992.

He is active in a variety of volunteer activities, which have included: Board member and Treasurer of Water Education Colorado, Board member and Treasurer of Colorado Preservation Inc, Advisory Board member for the Colorado Main Street Program, Vice Chairman for Public Affairs and Board member of the South Metro Denver Chamber of Commerce, Chairman and Secretary of the Arapahoe County Retirement Board, instructor for the Colorado Government Finance Officers Association, and national instructor for the American Water Works Association.

He holds a Bachelor's Degree in Economics and Rhetoric from the University of Massachusetts, a Master's Degree in City Planning from Cornell University, and a Master's Degree in Finance from the University of Colorado and maintains the Series 7, 50, and 63 licenses.

**Relevant Colorado County Experience:** Adams County Communications Authority, Moffat County, Fremont County, Huerfano County, Chaffee County, and Otero County.

### Stacey Masy, Vice President

Stacey Mast joined Stifel's Public Finance team in 2017. Ms. Berlinger started her career in municipal finance at Piper Sandler in 2013, where she worked on the fixed income sales and trading desk and in the public finance department. She has experience serving a variety of municipal issuers throughout Colorado, inclusive of cities, towns, counties, water/wastewater providers, and special districts. She received her Bachelor of Science in Finance from the University of Colorado at Boulder and maintains the Series 7, 63, 50, and 52 licenses.

**Relevant Colorado County Experience:** Adams County, Chaffee County, City and County of Denver, El Paso County, Fremont County, Larimer County, Moffat County, Pitkin County and Otero County.