



October 25, 2023

Jennifer Ott
City Manager
City of Alameda
2263 Santa Clara Avenue
Alameda, CA 94501

Submitted via email to: jott@alamedaca.gov

RE: Infrastructure Bond Measure SOQ and Scope Proposal

Dear Jennifer:

It was great meeting with you - I enjoyed learning more about what is happening in the City of Alameda and your interest in the possibility of an infrastructure bond on the 2024 or a future ballot. Our team is eager to help you achieve your strategic goals.

In the interest of moving quickly and getting to work, the following is a very brief statement of qualifications and scope of work. Please do not hesitate to contact me with additional questions or concerns after you've had a chance to review this document.

Our Team

Your feasibility assessment and subsequent public engagement and education effort (if feasibility is present) will be led by CliffordMoss founding principal Tom Clifford.

Tom Clifford, CliffordMoss Founding Principal

Tom is a seasoned strategist, attorney, and expert communications navigator, with significant leading complex and diverse stakeholder interests to win project approvals and prevail in the most difficult electoral environments across the State of California. Tom graduated from UC Berkeley, worked in the State Capitol and served as a CORO fellow before completing a joint degree in law at UC Berkeley (Boalt Hall) and public policy at Princeton University. He practiced public law and litigation at Bingham McCutchen in San Francisco for six years before moving into political consulting. Tom enjoys working on thorny political issues that tap his political strategy *and* legal expertise. He has helped win voter approval of massive, "must-pass" ballot measures, and worked to elect statewide and local elected leaders. He has also served as lead strategist on scores of important public projects for Fortune 500 companies, professional sports teams, non-profit organizations, and other community-based organizations. Tom lived in Latin America for several years, speaks Spanish and Marathi (in addition to English), and has extensive experience with campaigns that have multi-cultural and multi-lingual components. Tom lives in Oakland with his wife and three children.

Relevant Experience

Our team has extensive experience throughout Alameda County. Indeed, helped the City of Alameda with its UUT measure, we've worked with the Cities of San Leandro, Hayward, Berkeley, the County of Alameda, and many other local jurisdictions. Last cycle we helped the City of Oakland's with Measure U – an infrastructure bond on the November 2022 ballot.

Collectively we bring a breadth and depth of local, regional, statewide, and industry-specific experience that prepares us to succeed in our work with you.

Preliminary Thinking

We understand your primary focus is the everyday management and operations of the city. With that said, you are considering placing a measure on the local ballot. ***Make no mistake – this is a significant undertaking.*** We are here to help your team navigate to that you have the very best chance to secure the outcome you need. We see your project unfolding in two phases.

Phase 1: Feasibility

In the feasibility phase we will work with your team and FM3 Research to draft a sample ballot statement, conduct a survey to “pressure test” the measure, run additional data-driven political diagnostics to determine the existing level of voter support and feasibility of your measure, coach you on conducting initial stakeholder outreach, and help you conduct a financial analysis so we better understand how much a potential measure could raise.

The feasibility phase is the least expensive phase but most important element of a ballot measure effort. During feasibility we will also try to answer some other key questions, such as:

- Is a 2024 ballot measure feasible?
- What is the ideal tax rate?
- What are the outlines of our investment plan? How would the money be spent?
- Who is supportive, who is skeptical? Is there going to be opposition?

Phase One will give us the data we need to decide whether to move forward preparing to place an infrastructure measure on the 2024 ballot.

If the City decides to proceed to the ballot – you will then authorize us to move on to Phase Two (described in more detail below).

Phase 2: Stakeholder Engagement, Public Outreach and Ballot Measure Preparation

Assuming we conduct a phase one and determine feasibility is present and we are moving forward, Phase Two involves further developing an infrastructure investment plan, robust public outreach and engagement, and working with the city to draft a measure and place it on the ballot. We will further outline a written plan for Phase Two as we near the end of feasibility if it appears as though we will move forward with the project.

Scope of Services

Projects of this nature succeed when they receive two things: significant energy from client principals and project managers (the city) and an equal investment in strategy and thought partnership from the advisor (us). We will be there with you every step of the way.

Accordingly, here is a proposed scope for the feasibility Phase One of this project:

- Engage in an expeditious orientation for the CliffordMoss/FM3 team to ensure a strategic understanding of the City's baseline, plan for strategic impact and definition of success. Make certain we are all on the same page.
- Plan and conduct a robust feasibility effort – including voter research, initial community/stakeholder outreach and further political diagnoses.
- Assist FM3 in drafting and executing an excellent poll that will help us determine timing, jurisdiction, tax rate and messaging.
- Analyze the city voter file as well as previous ballot measure efforts and outcomes to better understand our current endeavor.
- Attend project team meetings by phone, video conference, in person, and/or stakeholder meetings as needed and strategically appropriate. Meet with the Project Team on a regular schedule. Provide ongoing political strategy support.

Phase 2 Scope:

- Draft and execute a plan for multi-faceted informational outreach to the community. This plan can include one-page flyers, mailers, or can also include a video and online outreach campaign that informs the public about the city and its needs.
- Provide messaging, and training for potential spokespeople, including project leaders or participating elected officials. We train you to tell your story effectively.
- Guide you in the process of “network-mapping” your community and engaging those identified in opinion leader interviews and other strategic meetings to get their sense of the community, your needs, and your goals.
- Work with you and your financial and legal counsel to effectively package your measure to finalize the core messaging and preparing ballot language, and make sure your ballot measure package filed is the right package to ensure electoral success.
- Provide ongoing strategic counsel to help you navigate the political terrain.

Fee Proposal

Again, as we discussed the best course of action is to approach this project in phases – with a “go forward” decision between each phase so that you are only committed to doing the work required in each phase.

This is not just smart budgeting practice; it also allows you to authentically communicate to stakeholders in your community that you are “assessing a potential measure” and “want their feedback.” The more you enroll community voices in the process, the more support you will have in the end if you do elect to place a measure on the ballot.

Our fee: \$7,500 per month. Note: this does not include the cost of polling or program costs (mail, video, etc.) the city will incur if we move forward to phase 2.

Thank you for the opportunity to explore teaming up with you. We are eager to move forward! Contact me tom@cliffordmoss.com or at 510-847-7155 with any questions.

Sincerely,

A handwritten signature in black ink, appearing to read 'Tom Clifford', with a stylized flourish extending from the end.

Tom Clifford
Principal, CliffordMoss LLC