

**CITY OF YUCAIPA  
AGENDA REPORT**

**TO:** Honorable Mayor and City Council

**FROM:** Ray Casey, City Manager   
Greg Franklin, Assistant City Manager 

**FOR:** City Council Meeting of November 25, 2019

**SUBJECT:** Paramedic Assessment and Sales Tax Ballot Measure

**RECOMMENDATION:**

That City Council:

1. Receive and file the Final Report from Strategy Research Institute relating to addressing the annual deficit in the City's Paramedic Program; and
2. Adopt Resolution No. 2019-56, calling and giving notice of the holding of a Special Municipal Election to be held on Tuesday, March 3, 2020 to present to voters a measure to levy a general Transactions and Use Tax of one-half percent and requesting the Board of Supervisors of the County of San Bernardino to consolidate a Special Municipal Election to be held on Tuesday, March 3, 2020 with the Statewide General Election to be held on the date pursuant to §10403 of the Elections Code relating to General Law cities; and
3. If Item #2 is approved, approve and authorize the City Manager, or his designee, to enter into a Professional Services Agreement with Integrated Marketing Communications Corp in an amount not to exceed \$49,200; and
4. If Item #2 is approved, direct staff to establish a community-wide committee that will assist in the community outreach efforts.

**BACKGROUND:**

In fiscal year 1999-2000, the City assumed responsibility for the provision of fire protection and paramedic services. Up until that time, those services were provided to the community through a Special District of San Bernardino County, known as County Service Area No. 38 (CSA38). As a result of that assumption of responsibility, the City's fire protection services are funded entirely by revenues generated from property taxes that were shifted to the City from CSA 38.

The Paramedic Program is funded entirely through a special assessment approved by the voters initially in 1987. The original assessment equated to an annual amount equal to \$24 per residential unit. Because of the escalation of costs, and the premise that the Paramedic Program is to be funded entirely by the Paramedic Assessment, the voters approved an increase to the annual assessment in 2004 to the current amount of \$52 per residential unit. The 2004 paramedic assessment was approved by the voters with no escalation clause. As a result, the amount of assessment per unit has not increased in 15 years. Therefore, the total annual revenue is increased only by the number of new units assessed. In 2004, the voters understood that the assessment amount would be sufficient to cover the estimated and escalating costs of the program for approximately 10 years, or through 2014. Fiscal year 2015/2016 represented the first year in which revenues were not sufficient to cover the annual expenses. As a result, an accumulated fund balance has been covering the annual deficit in the Program since fiscal year 2015/2016. The annual projected deficit will continue to grow, as the increase in revenues is already not sufficient to cover the ongoing increases in expenditures.

The total amount of the assessment projected for fiscal year 2019/2020 is approximately \$1,077,500. The proposed 2019/2020 expenditure budget for paramedic services is approximately \$1,736,378. This represents a projected annual deficit of approximately \$658,878. Absent the accumulated Fund Balance in the Paramedic Program, the projected deficit is funded by the property taxes collected for fire protection services. In addition, as applied resources remain the same and the calls for service continue to increase, there is a direct effect on the response times for personnel to adequately respond to emergencies. When calls for service increase and resources remain the same, the corresponding time it takes for a unit to respond to a call increases.

#### DISCUSSION:

As a result of the fiscal deficit described above, the City desires to return to the voters with a ballot measure to raise the funds sufficient to ensure that the Paramedic Program is entirely self-sustaining. To that end, the City Council approved a Service Level Option in the 2017/2018 Adopted Budget to provide funding to obtain the services of a qualified firm to assess the fiscal condition of the Paramedic Program and assist the City in evaluating the best approach in order to return to the voters for an appropriate ballot measure.

In July 2019, the City entered into a Professional Services Agreement with Strategy Research Institute (SRI). The scope of SRI's Agreement includes, but is not limited to:

- A. Review and analyze the existing Fire Protection and Paramedic Services Master Plan (Draft) to understand the City's current state of fire protection and paramedic services.
- B. Meet with City staff, Community Committee (if determined necessary) and City Council Ad-Hoc Committee to determine and develop most appropriate approach to completing the Project, including a detailed timeline of necessary steps.
- C. Compile the issues and needs to be tested within a public opinion survey.

- D. Create a survey instrument and develop the most effective and appropriate method for implementing the public opinion survey and collecting the data, which included undertaking a statistically online and/or telephone poll of residents to determine community interest relative to an additional sales tax or an increase in the Paramedic Assessment amount.
- E. Provide statistical data from which conclusions can be drawn and prepare recommendations relative to the number of respondents and the effect on the margin of error.
- F. Prepare alternatives analysis for both options, including paramedic special assessment and sales tax measure.
- G. Prepare final report, complete with results and recommendations for proceeding to an election ballot measure.
- H. Present final report to the City. The Final Draft report has been presented to the City's Fire Ad-Hoc Committee and other Councilmembers individually. The Final Report is being presented to the City Council with this agenda item.

SRI has completed its analysis and the Final Report (Draft) is available under separate cover for Council review. The report provides all of the details of the results of the polling survey and includes the following recommendations:

1. The City should not place a funding Measure on the local ballot asking Yucaipa voters to authorize increasing the amount of the City's existing annual Special Assessment in order to avoid cutting back on vital paramedic services; rather, City officials should place a Measure on the local ballot asking local voters to authorize increasing the City's sales tax by one-half percent increasing the local sales tax rate from 7¾% to 8¼%. The official ballot question will be as follows:

*To avoid cutbacks in Yucaipa's existing paramedic program and increased response times on emergency 911 calls; generate funds from Yucaipa visitors to benefit local residents; enhance police and fire protection; increase local youth and senior services; and fund other general services provided throughout the City like streets and parks, shall the ordinance be adopted to increase the local sales tax by one-half percent; generating approximately \$2,000,000 annually, with citizen oversight, mandatory audits, and public reporting?*

A Special Election is required if the election occurs outside of an election where Councilmembers are elected. Resolution No. 2019-56, requiring a unanimous vote of the Council to place the measure on the ballot, calls for the Special Election and for the County to consolidate the election with the County's (California's 2020 Primary). The Resolution includes Ordinance No. 382, as Exhibit A, which, if approved by Council by the adoption of Resolution No. 2019-56, will either be adopted or rejected by the electorate through the ballot process. Ordinance No. 382 has been approved, in form and content, by the California Department of Tax and Fee Administration.

2. The City should expand its community outreach efforts. The rationale for this recommendation can be seen, for example, in the relatively low satisfaction scores for the opportunities and services presently being provided through the City to local youth and seniors. The consultant believes these relatively low scores have little to do with the nature and/or volume of programs and services presently being provided to these two important subsets of the community; rather, it's the result of Yucaipa voters simply not being aware of what services are presently being provided to local youth and seniors. For example, between one-third (33%) and 43% of respondents to the present survey said they are "unsure" of what services are being provided to local youth and seniors; relatively few respondents reported being "unsatisfied" with these services. The consultant believes that once local residents learn of the nature, volume and quality of the programs and services presently being provided to local youth and seniors, the level of satisfaction will, undoubtedly, increase dramatically.

If the City Council determines to return to the voters with a ballot measure in March, 2020, staff recommends that City acquire the services of a firm to assist with the overall community outreach efforts for the ballot measure between December and March and beyond for a period of one year, if determined necessary in March, 2020. As mentioned above, the survey revealed a need for enhanced community outreach capabilities. While the City is prohibited from advocating a position regarding a ballot measure, the City has an obligation to the residents to inform them of the fiscal condition of the Paramedic Program, for instance, and of other programs and services being offered, especially to youth and seniors.

Staff has received a proposal from Integrated Marketing Communications Corporation (IMC), working in conjunction with SRI, to perform these services. The services would include two components, which will be administered simultaneously. The first component includes continuing the City's present social media activities and expanding informational/promotional activities beyond what they are today. The second component includes working with the City Manager, and other key staff, to create a Plan of Action designed to inform local residents of the programs and services presently being provided by/through the City. Then, when directed, expand this discussion to make salient (especially to those in the local electorate) the need for authorizing a half-cent sales tax in Yucaipa. Beyond that, in order to avoid any overlap and /or confusion, at the City Manager's directive, IMC personnel will interact and cooperate with any Department within the City that presently has its own social media outreach program in place in order to increase overall effectiveness of the social media outreach efforts.

#### **FISCAL IMPACT:**

The amount of funds to be generated by an increase in the Paramedic Assessment is expected to be approximately \$165,000-\$200,000, depending upon the per parcel amount requested in a ballot measure. The amount of funds to be generated by a local sales tax measure, equal to one-half cent, is estimated to be \$2,000,000-\$2,100,000. It is recommended that the additional revenue, generated by the local sales tax measure, be deposited and maintained in its own

operational Special Revenue Fund. This is similar to the current accounting practice employed for the City's Fire Fund. Currently, the fiscal activities in the Fire Fund are isolated in a Special Revenue Fund so that the revenues and expenses within that Fund can be easily tracked and identified. This acts as a sort of firewall for those resources, in that they are not commingled with other General Fund revenues and expenses. It is recommended that the proceeds from the local sales tax measure, if approved, be treated similarly to ensure transparency to the taxpayers and efficiently report the results to the community.

The original Service Level Option for the polling consultant was approved in the amount of \$35,000. The services provided through the Agreement with SRI were \$24,000, leaving a balance of \$11,000. The cost of entering into a Professional Services Agreement with IMC is \$4,100 per month, including the costs of back-end maintenance and website maintenance for a total not-to-exceed cost in the amount of \$49,200. It is recommended that the amount of \$11,000 be allocated from the amount remaining from the Service Level Option and that the balance in the amount of \$38,200 be split evenly between the Fire/Paramedic funds (\$19,100) and the General Fund Contingency Account (\$19,100). The balance in the General Fund Contingency Account is currently \$100,000. In addition, there is another item on the same agenda requesting \$12,000 from the Contingency Account, reducing the available balance to \$88,000. Authorizing the amount of \$19,100 will leave a balance in the amount of \$68,900. There are sufficient funds in the Fire/Paramedic Budgets to cover the additional amount of \$19,100.

Attachments:

IMC Proposal for Enhanced Social Media Network Services

Final Draft Report to Address Annual Deficit in City's Paramedic Program (available under separate cover)

## RESOLUTION NO. 2019-56

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF YUCAIPA, CALIFORNIA, CALLING AND GIVING NOTICE OF THE HOLDING OF A SPECIAL MUNICIPAL ELECTION TO BE HELD ON TUESDAY, MARCH 3, 2020 TO PRESENT TO THE VOTERS A MEASURE TO LEVY A GENERAL TRANSACTIONS AND USE TAX OF ONE-HALF PERCENT, APPROVING THE ORDINANCE TO BE SUBMITTED TO THE VOTERS, AND REQUESTING THAT THE BOARD OF SUPERVISORS OF THE COUNTY OF SAN BERNARDINO CONSOLIDATE THE SPECIAL MUNICIPAL ELECTION TO BE HELD ON TUESDAY, MARCH 3, 2020 WITH THE STATEWIDE PRIMARY ELECTION TO BE HELD ON THE DATE PURSUANT TO §10403 OF THE ELECTIONS CODE

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WHEREAS, on November 6, 1996, the voters of the State of California approved Proposition 218 (California Constitution, articles XIII C and XIII D), an amendment to the California Constitution requiring that all general taxes which are imposed, extended or increased must be approved by a majority vote of the electorate; and

WHEREAS, California Revenue and Taxation Code Section 7285.9 authorizes the City of Yucaipa (the "City") to levy a general transactions and use tax by ordinance following approval by two-thirds of the City Council and adoption by a simple majority of the qualified electors of the City voting in an election on the issue; and

WHEREAS, the levying of a transactions and use tax of one-half percent would not cause the overall transactions and use tax in the City to exceed the limits imposed by California Revenue and Taxation Code section 7251.1; and

WHEREAS, the City is dedicated to providing high quality paramedic and other emergency response services, enhancing police and fire protection, increasing services for local youth and seniors, promoting economic development and maintaining local streets and sidewalks and enhancing other general city services; and

WHEREAS, in 1987, the electorate within the unincorporated area of Yucaipa approved a flat-rate special tax to fund the Paramedic Emergency Services Program, as provided by the San Bernardino County Service Area No. 38 (CSA 38) ; and

WHEREAS, in 1999, the City of Yucaipa assumed the responsibility for the provision of Fire and Paramedic Services, formerly provided by CSA 38; and

WHEREAS, in 2004, the City proposed, and the voters passed, Measure Y, titled "Paramedic Emergency Medical Services Special Tax" to fund the Paramedic Emergency Services Program; and

WHEREAS, according to the Impartial Analysis for Measure Y, the then-new special tax was anticipated to fully fund paramedic services city-wide for approximately ten years, "after which time the City Council and the voters will determine whether further increases in the tax will be necessary in order to continue to fund paramedic service with special tax revenues"; and

WHEREAS, the revenue collected from the Special Tax is now insufficient to fully fund the City's Paramedic Services; and

WHEREAS, over the past decade, the City of Yucaipa's revenues have not kept pace with the growing costs associated with providing the high quality local general municipal services and

**RESOLUTION NO. 2019-56**

**PAGE 2**

facilities that Yucaipa residents expect and deserve, including (but not limited to) emergency response services provided by Cal Fire, specifically the Paramedic Program which has operated at a deficit since Fiscal Year 2015, the San Bernardino County Sheriff's Department, and youth and senior services; and;

WHEREAS, in order to address these looming fiscal issues as soon as possible the City Council desires to place a local funding measure on the ballot to provide a stable source of general fund revenue to sufficiently fund the ongoing costs of the Paramedic Program, to enhance and maintain the City's infrastructure, and keep the many important services the City provides with general fund revenue; and

WHEREAS, many recipients and potential recipients of the City's services are non- resident employees, travelers, and visitors who are consumers of goods and services in Yucaipa, but not property owners in Yucaipa; and

WHEREAS, in order to ensure the City's fiscal stability, an additional revenue source is required that spreads the cost of municipal infrastructure and services more equitably across the population it serves; and

WHEREAS, an additional source of local funding is needed to ensure the City is able to maintain its local fire department and that the City has enough police, firefighters and paramedics to respond quickly to keep our community safe; and

WHEREAS, an additional source of local funding would also maintain streets and repair potholes and help fund senior and youth programs; and

WHEREAS, by keeping the City safe, clean and well maintained, if enacted, a local funding measure would help protect residents' quality of life and property values; and

WHEREAS, California Elections Code section 9222 authorizes the City Council to submit to the voters a proposition for the enactment of any ordinance at an election held not less than 88 days after the date of the order of election.

WHEREAS, the City Council wishes to call the Special Election and place a 0.5% general transactions and use tax measure on the ballot.

NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF YUCAIPA, CALIFORNIA, DOES RESOLVE, DECLARE, DETERMINE, AND ORDER AS FOLLOWS:

**Section 1. Findings.** The City Council finds that all of the preceding recitals are true and correct.

**Section 2. Call for Special Municipal Election.** Pursuant to the requirements of the laws of the State of California relating to general law cities, there is called and ordered to be held in the City of Yucaipa, California, on Tuesday, March 3, 2019, a Special Municipal Election for the purpose of presenting voters with a proposed transactions and use general tax measure at a rate of 0.5%, the revenue from which would fund general municipal infrastructure and services. If approved, the proposed tax would be collected and administered by the California Department of Tax and Fee Administration.



**RESOLUTION NO. 2019-56**

**PAGE 4**

**Section 10. Notice of Election.** Notice of the time and place of holding the election is given and the City Clerk is authorized, instructed and directed to give further or additional notice of the election, in time, form and manner as required by law. Notwithstanding the generality of the foregoing, the City Clerk is hereby instructed to act in conformance with California Elections Code §10403 and to file a certified copy of this Resolution with the Board of Supervisors of San Bernardino County and to transmit a copy of the same to the San Bernardino County Elections Official forthwith.

**Section 11. Consolidation.** Pursuant to the requirements of §10403 of the Elections Code, the Board of Supervisors of the County of San Bernardino is hereby requested to consent and agree to the consolidation of a Special Municipal Election with the Statewide Primary Election to be held on Tuesday, March 3, 2020. The consolidated election shall be held and conducted in the manner prescribed in §10418 of the Elections Code.

**A.** The County Registrar of Voters is authorized to canvass the returns of the General Municipal Election. The election shall be held in all respects as if there were only one election. The election will be held and conducted in accordance with the provisions of law regulating the statewide election.

**B.** The Board of Supervisors is requested to issue instructions to the County Registrar of Voters to take any and all steps necessary for the holding of the consolidated election.

**C.** The City of Yucaipa recognizes that additional costs will be incurred by the County by reason of this consolidation and agrees to reimburse the County for any such costs incurred following presentation of a reasonably itemized invoice.

**Section 12. Certification.** The City Clerk shall certify to the passage and adoption of this Resolution and enter it into the book of original Resolutions.

PASSED, APPROVED AND ADOPTED by unanimous vote this 25<sup>th</sup> day of November 2019.

ATTEST:

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JENNIFER CRAWFORD  
DEPUTY CITY MANAGER / CITY CLERK

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BOBBY DUNCAN  
MAYOR

**EXHIBIT “A”**

Proposed Transactions and Use Tax Ordinance  
[see attached behind this page]

**EXHIBIT A**

**ORDINANCE NO. 382**

**AN ORDINANCE OF THE CITY YUCAIPA, CALIFORNIA, IMPOSING  
A 0.5% GENERAL TRANSACTIONS AND USE TAX UPON APPROVAL  
BY VOTERS, TO BE ADMINISTERED BY THE CALIFORNIA  
DEPARTMENT OF TAX AND FEE ADMINISTRATION**

**THE CITY COUNCIL OF THE CITY OF YUCAIPA DOES HEREBY ORDAIN  
AS FOLLOWS:**

**Section 1.** Chapter 3.32 (“Transactions and Use Tax”) is hereby added to Title 3 (“Revenue and Finance”) of the Yucaipa Municipal Code with the following provisions:

**Section 3.32.010. Title.** This chapter shall be known as the City of Yucaipa Transactions and Use Tax Ordinance. The City of Yucaipa hereinafter shall be called "City." This chapter shall be applicable in the incorporated territory of the City.

**Section 3.32.020. Operative Date.** "Operative Date" means the first day of the first calendar quarter commencing more than 110 days after the adoption of this ordinance by the voters, the date of such adoption being as set forth below.

**Section 3.32.030. Purpose.** This chapter is adopted to achieve the following, among other purposes, and directs that the provisions hereof be interpreted in order to accomplish those purposes:

A. To impose a retail transactions and use tax in accordance with the provisions of Part 1.6 (commencing with Section 7251) of Division 2 of the Revenue and Taxation Code and Section 7285.9 of Part 1.7 of Division 2 which authorizes the City to adopt this tax ordinance which shall be operative if a majority of the electors voting on the measure vote to approve the imposition of the tax at an election called for that purpose.

B. To adopt a retail transactions and use tax ordinance that incorporates provisions identical to those of the Sales and Use Tax Law of the State of California insofar as those provisions are not inconsistent with the requirements and limitations contained in Part 1.6 of Division 2 of the Revenue and Taxation Code.

C. To adopt a retail transactions and use tax ordinance that imposes a tax and provides a measure therefore that can be administered and collected by the California Department of Tax and Fee Administration in a manner that adapts itself as fully as practicable to, and requires the least possible deviation from, the existing statutory and administrative procedures followed by the California Department of Tax and Fee Administration in administering and collecting the California State Sales and Use Taxes.

D. To adopt a retail transactions and use tax ordinance that can be administered in a manner that will be, to the greatest degree possible, consistent with the provisions of Part 1.6 of Division 2 of the Revenue and Taxation Code, minimize the cost of collecting the transactions and use taxes, and at the same time, minimize the burden of record keeping upon persons subject to taxation under the provisions of this chapter.

**Section 3.32.040. Contract with State.** Prior to the operative date, the City shall contract with the California Department of Tax and Fee Administration to perform all functions incident to the administration and operation of this transactions and use tax chapter; provided, that if the City shall not have contracted with the California Department of Tax and Fee Administration prior to the operative date, it shall nevertheless so contract and in such a case the operative date shall be the first day of the first calendar quarter following the execution of such a contract.

**Section 3.32.050. Transactions Tax Rate.** For the privilege of selling tangible personal property at retail, a tax is hereby imposed upon all retailers in the incorporated territory of the City at the rate of 0.5% of the gross receipts of any retailer from the sale of all tangible personal property sold at retail in said territory on and after the operative date of this chapter.

**Section 3.32.060. Place of Sale.** For the purposes of this chapter, all retail sales are consummated at the place of business of the retailer unless the tangible personal property sold is delivered by the retailer or his agent to an out-of-state destination or to a common carrier for delivery to an out-of-state destination. The gross receipts from such sales shall include delivery charges, when such charges are subject to the state sales and use tax, regardless of the place to which delivery is made. In the event a retailer has no permanent place of business in the State or has more than one place of business, the place or places at which the retail sales are consummated shall be determined under rules and regulations to be prescribed and adopted by the California Department of Tax and Fee Administration.

**Section 3.32.070. Use Tax Rate.** An excise tax is hereby imposed on the storage, use or other consumption in the City of tangible personal property purchased from any retailer on and after the operative date of this chapter for storage, use or other consumption in said territory at the rate of 0.5% of the sales price of the property. The sales price shall include delivery charges when such charges are subject to state sales or use tax regardless of the place to which delivery is made.

**Section 3.32.080. Adoption of Provisions of State Law.** Except as otherwise provided in this chapter and except insofar as they are inconsistent with the provisions of Part 1.6 of Division 2 of the Revenue and Taxation Code, all of the provisions of Part 1 (commencing with Section 6001) of Division 2 of the Revenue and Taxation Code are hereby adopted and made a part of this chapter as though fully set forth herein.

**Section 3.32.090. Limitations on Adoption of State Law and Collection of Use Taxes.** In adopting the provisions of Part 1 of Division 2 of the Revenue and Taxation Code:

A. Wherever the State of California is named or referred to as the taxing agency, the name of this City shall be substituted therefor. However, the substitution shall not be made when:

1. The word "State" is used as a part of the title of the State Controller, State Treasurer, State Treasury, State Department of Tax and Fee Administration, or the Constitution of the State of California;

2. The result of that substitution would require action to be taken by or against this City or any agency, officer, or employee thereof rather than by or against the California

Department of Tax and Fee Administration, in performing the functions incident to the administration or operation of this chapter.

3. In those sections, including, but not necessarily limited to sections referring to the exterior boundaries of the State of California, where the result of the substitution would be to:

a. Provide an exemption from this tax with respect to certain sales, storage, use or other consumption of tangible personal property which would not otherwise be exempt from this tax while such sales, storage, use or other consumption remain subject to tax by the State under the provisions of Part 1 of Division 2 of the Revenue and Taxation Code, or;

b. Impose this tax with respect to certain sales, storage, use or other consumption of tangible personal property which would not be subject to tax by the state under the said provision of that code.

4. In Sections 6701, 6702 (except in the last sentence thereof), 6711, 6715, 6737, 6797 or 6828 of the Revenue and Taxation Code.

B. The word "City" shall be substituted for the word "State" in the phrase "retailer engaged in business in this State" in Section 6203 of the Revenue and Taxation Code and in the definition of that phrase in Section 6203.

1. "A retailer engaged in business in the District" shall also include any retailer that, in the preceding calendar year or the current calendar year, has total combined sales of tangible personal property in this state or for delivery in the State by the retailer and all persons related to the retailer that exceeds five hundred thousand dollars (\$500,000). For purposes of this section, a person is related to another person if both persons are related to each other pursuant to Section 267(b) of Title 26 of the United States Code and the regulations thereunder.

**Section 3.32.0100. Additional Permit Not Required.** If a seller's permit has been issued to a retailer under Section 6067 of the Revenue and Taxation Code, an additional transactor's permit shall not be required by this chapter.

**Section 3.32.0110. Exemptions and Exclusions.**

A. There shall be excluded from the measure of the transactions tax and the use tax the amount of any sales tax or use tax imposed by the State of California or by any city, city and county, or county pursuant to the Bradley-Burns Uniform Local Sales and Use Tax Law or the amount of any state-administered transactions or use tax.

B. There are exempted from the computation of the amount of transactions tax the gross receipts from:

1. Sales of tangible personal property, other than fuel or petroleum products, to operators of aircraft to be used or consumed principally outside the county in which the sale is made and directly and exclusively in the use of such aircraft as common carriers of persons or property under the authority of the laws of this State, the United States, or any foreign government.

2. Sales of property to be used outside the City which is shipped to a point outside the City, pursuant to the contract of sale, by delivery to such point by the retailer or his agent, or by delivery by the retailer to a carrier for shipment to a consignee at such point. For the purposes of this paragraph, delivery to a point outside the City shall be satisfied:

a. With respect to vehicles (other than commercial vehicles) subject to registration pursuant to Chapter 1 (commencing with Section 4000) of Division 3 of the Vehicle Code, aircraft licensed in compliance with Section 21411 of the Public Utilities Code, and undocumented vessels registered under Division 3.5 (commencing with Section 9840) of the Vehicle Code by registration to an out-of-City address and by a declaration under penalty of perjury, signed by the buyer, stating that such address is, in fact, his or her principal place of residence; and

b. With respect to commercial vehicles, by registration to a place of business out-of-City and declaration under penalty of perjury, signed by the buyer, that the vehicle will be operated from that address.

3. The sale of tangible personal property if the seller is obligated to furnish the property for a fixed price pursuant to a contract entered into prior to the operative date of this chapter.

4. A lease of tangible personal property which is a continuing sale of such property, for any period of time for which the lessor is obligated to lease the property for an amount fixed by the lease prior to the operative date of this chapter.

5. For the purposes of subparagraphs (3) and (4) of this section, the sale or lease of tangible personal property shall be deemed not to be obligated pursuant to a contract or lease for any period of time for which any party to the contract or lease has the unconditional right to terminate the contract or lease upon notice, whether or not such right is exercised.

C. There are exempted from the use tax imposed by this chapter, the storage, use or other consumption in this City of tangible personal property:

1. The gross receipts from the sale of which have been subject to a transactions tax under any state-administered transactions and use tax chapter.

2. Other than fuel or petroleum products purchased by operators of aircraft and used or consumed by such operators directly and exclusively in the use of such aircraft as common carriers of persons or property for hire or compensation under a certificate of public convenience and necessity issued pursuant to the laws of this State, the United States, or any foreign government. This exemption is in addition to the exemptions provided in Sections 6366 and 6366.1 of the Revenue and Taxation Code of the State of California.

3. If the purchaser is obligated to purchase the property for a fixed price pursuant to a contract entered into prior to the operative date of this chapter.

4. If the possession of, or the exercise of any right or power over, the tangible personal property arises under a lease which is a continuing purchase of such property for any period of time for which the lessee is obligated to lease the property for an amount fixed by a lease prior to the operative date of this chapter.

5. For the purposes of subparagraphs (3) and (4) of this section, storage, use, or other consumption, or possession of, or exercise of any right or power over, tangible personal property shall be deemed not to be obligated pursuant to a contract or lease for any period of time for which any party to the contract or lease has the unconditional right to terminate the contract or lease upon notice, whether or not such right is exercised.

6. Except as provided in subparagraph (7), a retailer engaged in business in the City shall not be required to collect use tax from the purchaser of tangible personal property, unless the retailer ships or delivers the property into the City or participates within the City in making the sale of the property, including, but not limited to, soliciting or receiving the order, either directly or indirectly, at a place of business of the retailer in the City or through any representative, agent, canvasser, solicitor, subsidiary, or person in the City under the authority of the retailer.

7. "A retailer engaged in business in the City" shall also include any retailer of any of the following: vehicles subject to registration pursuant to Chapter 1 (commencing with Section 4000) of Division 3 of the Vehicle Code, aircraft licensed in compliance with Section 21411 of the Public Utilities Code, or undocumented vessels registered under Division 3.5 (commencing with Section 9840) of the Vehicle Code. Such retailer shall be required to collect use tax from any purchaser who registers or licenses the vehicle, vessel, or aircraft at an address in the City.

D. Any person subject to use tax under this chapter may credit against that tax any transactions tax or reimbursement for transactions tax paid to a district imposing, or retailer liable for a transactions tax pursuant to Part 1.6 of Division 2 of the Revenue and Taxation Code with respect to the sale to the person of the property the storage, use or other consumption of which is subject to the use tax.

**Section 3.32.0120. Resident Oversight.** A five-member Residents' Oversight Committee shall be created by the City Council and meet annually to review and publicly report on the expenditure of revenues generated by the tax imposed by this Ordinance. Members of the Committee will be appointed to two-year terms by the City Council. The City Council may, by resolution, adopt rules and guidelines for the Committee's work.

**Section 3.32.0130. Audit and Review.** The proceeds of the tax imposed by this chapter, as well as the expenditure thereof, shall be audited annually by an independent accounting firm in connection with the City's annual financial audits. The City Council shall discuss the results of such audit at a meeting of the City Council that is open to the public. The report of such audit shall be posted on the City's website and made available to the public upon request.

**Section 3.32.0140. Amendments.** All amendments subsequent to the effective date of this chapter to Part 1 of Division 2 of the Revenue and Taxation Code relating to sales and use taxes and which are not inconsistent with Part 1.6 and Part 1.7 of Division 2 of the Revenue and Taxation Code, and all amendments to Part 1.6 and Part 1.7 of Division 2 of the Revenue and Taxation Code, shall automatically become a part of this chapter, provided however, that no such amendment shall operate so as to affect the rate of tax imposed by this chapter. Pursuant to Elections Code Section 9217, the City Council may amend this ordinance as deemed necessary for collection, administration, and enforcement provided, however, that no such amendment shall operate so as to affect the rate of tax imposed by this ordinance.

**Section 3.32.0150. Enjoining Collection Forbidden.** No injunction or writ of mandate or other legal or equitable process shall issue in any suit, action or proceeding in any court against the State or the City, or against any officer of the State or the City, to prevent or enjoin the collection under this chapter, or Part 1.6 of Division 2 of the Revenue and Taxation Code, of any tax or any amount of tax required to be collected.

**Section 2. Severability.** If any provision of this Ordinance, this chapter, or the **application** thereof to any person or circumstance is held invalid, the remainder of the chapter and the application of such provision to other persons or circumstances shall not be affected thereby.

**Section 3. Effective Date.** This Ordinance relates to the levying and collecting of the City transactions and use taxes and shall take effect immediately.

**Section 4. Execution.** The Mayor shall sign and the City Clerk shall attest to the passage of this Ordinance upon certification by the City Council of the results of the March 3, 2020 election approving this Ordinance. The City Clerk shall transmit the adopted and executed Ordinance to the California Department of Tax and Fee Administration forthwith.

**PASSED, APPROVED and ADOPTED** by the voters of the City of Yucaipa, State of California, on March 3, 2020.

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Bobby Duncan, Mayor

**ATTEST:**

---

Jennifer Crawford, City Clerk

**APPROVED AS TO FORM:**

---

David M. Snow, City Attorney

**Proposal for...**

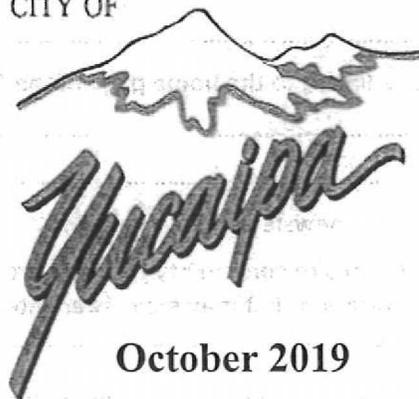
**Upgrading the City's Community Outreach Capabilities**

**Maximizing Community Outreach Effectiveness thru...**

**Enhanced Social Media  
Network Services**

***Proposal prepared expressly for the...***

CITY OF



**October 2019**

**Integrated Marketing Communications Corp**  
P.O. Box 1724  
Lake Arrowhead, CA 92352  
(800) 224-7608



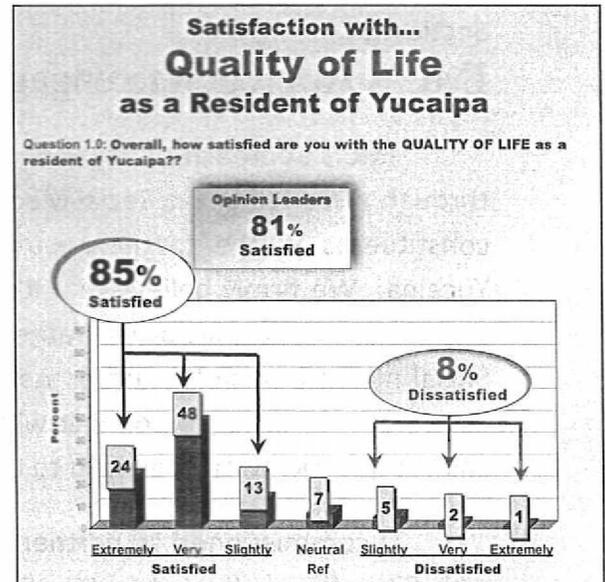
## Table of Contents

1.0	Situation Analysis.....	1
2.0	IMC’s Approach to Engaging the Social Media.....	2
3.0	Plan of Action for Social Media Outreach .....	4
4.0	Scope of Services (pertaining to employing the Social Media).....	4
4.1	Social Media Platforms .....	4
4.2	Email Tree .....	5
4.3	Feedback Email/Loop .....	5
4.4	IMC will assist in identifying and developing topics to promote .....	6
4.5	Events .....	6
4.6	Photography & Videography .....	7
4.7	E-Newsletter.....	7
4.8	Analytics .....	7
5.0	How IMC interacts with SRI during a specific campaign (e.g., toward extending Measure Q funding) .....	8
5.1	SRI builds the message strategy that MIRRORS the Core Values and Expectations of voters throughout the City of Yucaipa .....	8
5.2	Create a Q&A .....	8
5.3	Press Kit .....	8
5.4	Create web site linked to the home page of the City’s Website .....	9
5.5	News Tabloid.....	9
5.6	Social Media .....	10
5.7	Send bi-weekly “E-newsletters” via email.....	11
5.8	Public presentations to community and civic groups/organizations and any other organization that may express an interest in hosting a meeting for their members .....	11
6.0	Budget Parameters .....	12
7.0	Summary Conclusion.....	13
<u>Addendum A:</u>	Sample of Social Media Activity Report.....	14
<u>Addendum B:</u>	Bios of IMC employees to be assigned to this project.....	16
<u>Addendum C:</u>	IMC Professional References.....	19

## Section 1.0 Situation Analysis

As can be seen in the graphic at right, a huge majority (over 80%) of respondents in a recently conducted scientific survey said they are satisfied with the *quality of life* they enjoy as residents of Yucaipa; 48% report being “very satisfied”, and approximately one-fourth (24%) report being “extremely satisfied”.<sup>1</sup>

However, this survey also revealed a need for enhanced community outreach capabilities, which will lead to desirable outcomes.



For example, in the short term, this will provide a vehicle for informing Yucaipa voters of the need to authorize a half-cent sales tax that will allow City officials to secure the funds needed to operate and maintain the City’s **Paramedic Program** at current levels, and ultimately enhance these services; as well as generate revenues needed for providing additional programs and services designed to enhance the *quality of life* for local residents beyond what they are, today. In the long term, having enhanced community outreach capabilities will result in the “Satisfaction Scores” among Yucaipa residents becoming even higher than they are at the present time, especially in specific areas.

For example, while the Satisfaction Scores are high for such services as **fire protection** (88% satisfied), **paramedic services** (80% satisfied), **Park and Recreation Amenities** (86% satisfied), **police services** (75% satisfied)...the satisfaction score for the level of services and opportunities presently being provided **local youth** is only 52% AND for services being provided to **local seniors** is even lower (44% satisfied).

This is not the result of the City failing to provide adequate services to local youth and seniors; rather, it's the result of local residents simply NOT BEING AWARE of what services are presently being provided by/through the City to these two key subsets of the community. Thus, the need for **enhanced community outreach tools and capabilities**.

<sup>1</sup> This survey was conducted by IMC Corp’s sister organization, Strategy Research Institute (SRI).

Section 2.0

## IMC's Approach to engaging the Social Media

IMC's approach to engaging the Social Media is to promulgate (disseminate) content through a variety of the Social Media platforms that inform/educate, inspire, and entertain constituents in the target population; in this case, residents throughout the City of Yucaipa. We firmly believe that it's not enough for the City to merely *have* a **presence** on the social media platforms; rather, it needs to **engage** users through these platforms. Social media is **social**; in other words, there are real people behind every 'like' and every 'follower'. In order to connect with those people, it is imperative that we ask questions, answer questions, and respond to tweets, as well as being present.

If commissioned to partner with the City in such an endeavor, IMC staff will work with City officials (including City Departments heads) to attain stories and 'intel' with the intention of informing citizens on what is going on in the community, while simultaneously **ENGAGING** the community and securing Yucaipa residents' collective thoughts, wisdom and feedback. This will be accomplished through a variety of **Social Media platforms** including, but not necessarily limited to:

- Creating a Community Outreach Website & linking it to the City's Website
- Facebook
- Twitter
- YouTube
- Facebook Live
- Nextdoor (and similar neighborhood outlets that exist in Yucaipa)
- E-newsletter (typically monthly)

More specifically, **IMC Corp.** will...

- Work with City officials to **promote community events** in order to engage and encourage public involvement and cohesiveness (i.e. Yucaipa Autumnfest, Pumpkin Patch, events at the Yucaipa Performing Arts Center, Journey Education at Masonic Lodge, Breast Cancer Awareness Walk, Apple Butter Festival in Oak Glen, Christmas Parade, Sharps Collection Program, etc. etc. etc)
- .Produce and maintain a '**news calendar**' to be disseminated via **E-newsletter** and other social media platforms.

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- Build, grow and maintain an **E-mail Tree** for the City.
- Assist with ideas for **short videos** to be shared via social media.
- Consistently **engage** with residents and **encourage discussions**.
- Create an **E-mail Feedback Loop**, wherein residents of Yucaipa can ask questions via a private portal.
- Support the City's efforts involving Economic Development in any way City officials deem to be useful; for example, assist in attracting new businesses to Yucaipa, whatever.

IMC's approach will have two components:

- (i) Maintain the City's **present Community Outreach efforts**, including all of those platforms noted above (perhaps more).
- (ii) Allow for the creation of **effective campaigns** that focus exclusively upon a given desired outcome or set of outcomes (e.g., securing authorization for a half-cent sales tax, wherein the yield will be used to provide services and programs designed to enhance the *quality of life* for Yucaipa residents even beyond what it is, today).

The second component (noted above) is an excellent example of how IMC Corp. is perfectly positioned to enhance the professional services of its sister firm, SRI, on behalf of the City of Yucaipa.

In other words, the combined experience, expertise and resources of SRI and IMC Corp, working together, will ensure that the Community Outreach efforts on behalf of the City will prove to be far more expedient and effective; for example, when the funding Measure (for a half-cent sales tax) is placed on the ballot in Yr-2020. And, this is equally true of additional concentrated efforts that focus on specific objectives that will inevitably surface, over time. There is literally no other organization that is better positioned to support SRI and the City's objectives, going forward, than is IMC Corp.

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## Section 3.0

### Plan of Action for Social Media Outreach

IMC's recommended approach has two (2) components, which will be administered simultaneously.

**1<sup>st</sup> component:** Continue the City's present social media activities, except expand informational/promotional activities beyond what they are, today.

**2<sup>nd</sup> component:** Work with the City Manager (and his team), as well as SRI, to create a **Plan of Action** (including developing **message strategies, photo ops**, etc.) designed to inform local residents of the programs and services presently being provided by/through the City. Then, when directed, expand this discussion to make salient (especially to those in the local electorate) the need for (justification) for authorizing a half-cent sales tax in Yucaipa.

Beyond that, in order to avoid any overlap and/or confusion, at the City Manager's directive, IMC personnel will interact and cooperate with any Department within City government that presently has its own Social Media program in place (e.g., City Police and/or Cal-Fire).

## Section 4.0

### Scope of Services (pertaining to employing the Social Media)

#### 4.1 Social Media Platforms

##### a) Facebook:

IMC will compile 2-3 social media posts per week. These posts will be a combination of the community outreach topics regarding community events/news, etc. Facebook will play a central role whenever the City enters into a specific campaign; e.g., securing authorization from the local electorate for a half-cent sales tax in Yucaipa (or any other objective that surfaces, over time).

##### b) Twitter:

IMC will compile 2-3 tweets per week. These posts will promote community news/events, etc.; and play a central role in high profile campaigns such as the proposed half-cent sales tax and/or other matters of importance to City officials.

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In addition, IMC will follow neighboring agencies (including police/fire, etc), and 're-tweet' information that residents of Yucaipa will find of interest (e.g., traffic collision, fires, et al).

**c) Facebook Live:**

When/where appropriate, we encourage community leaders (Mayor, City Manager, Police Chief, other Influentials in the community) to do a '**Facebook Live**' chat. These are typically based upon: (i) an agenda item connected to a specific objective and/or issue of interest to the City, or (ii) are initiated through community feedback/concerns received via the various social media platforms; and-the-like. They are designed to share critical information and/or clarify "misinformation" that may be circulating in the community. IMC typically provides "talking points" and specific questions (with answers that are authorized by the City Manager) that the spokesperson needs to be prepared to address during the respective **Facebook Live** session.

**d) YouTube:**

IMC will create a YouTube account for the City of Yucaipa and create/upload videos/Facebook Live sessions.

**e) Nextdoor:**

IMC will create a link to a Nextdoor account for the City of Yucaipa.

This outlet needs to be employed strategically. For example, IMC will post messages on Nextdoor regarding topics of extreme importance to the City and/or topics of extreme relevance to the well-being of specific subsets of the community; such as changes in paramedic services, or other health-related services, that impact seniors, parents, and/or youth throughout the community.

**4.2 Email Tree**

IMC will build and grow an **E-mail tree** by inviting every visitor to request being added to the City's E-mail list. This makes it possible for the City to send out E-mail Blasts, when desired; which plays a central role during high-profile campaigns.

**4.3 Feedback Email/Loop**

IMC has found that often residents are hesitant to share their thoughts on public forums; as such, this mechanism provides constituents with a private forum to ask questions and provide their feedback/input.

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As noted above, IMC will build into each platform a **FEEDBACK loop** (email), wherein visitors are encouraged to provide their feedback and/or ask questions.

- In our weekly Activity Report, IMC will include an overview of feedback (questions/comments) received from the community, and keep a '**master list**' of all comments and replies.
- Typically, in a specific campaign (e.g., a funding Measure such as the upcoming “ask” for creating a half-cent sales tax in Yucaipa), SRI creates a Q&A (*question and answer*) document; this gives IMC a database of 'approved replies'...thus, lessening work from the Client’s end. That makes it possible for IMC staff to draft the initial response to most questions; then, send these responses to the Client to be reviewed, polished, edited, or altogether re-written BEFORE being sent back to the respective constituent.
- This interactive process is intended to provide answers to constituents’ questions within 24 to 48 hours, which helps build a trust relationship between the City and its constituents...thus, moving beyond “Satisfaction” to a sense of LOYALTY to the City, which is a factor that drives such behaviors as voting behavior.

#### 4.4 IMC will assist in identifying and developing topics to promote.

IMC Corp will partner with City officials and staff in identifying and developing topics to promote. For example:

- Get to know your **City** on a more personal level
- Get to know your **Public Library**
- Get to know your **City officials**
- Get to know how to help local youth avoid “**At Risk**” behaviors
- Get to know the various City-sponsored programs and services, such as **youth and senior-related programs**.

#### 4.5 Events

IMC will work with community officials to come up with ideas for community related events.

**Ideas include:**

- **Coffee with a cop** – find a local coffeehouse and invite residents on a quarterly basis to '*have coffee with a cop*'. Encourages community building, getting to know your officers on a personal level, etc.

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- **Building a community garden**
- **Creating a 'walking club' encouraging healthy living**
- **The list goes on and on**

**4.6 Photography & Videography.** It's often stated that *a picture is worth 1,000 words*. This is NOT an exaggeration...

4.6a IMC will review whatever photos the City has in hand that can be used to tell a story; e.g., photos of the community, events, youth programs, etc. If authorized, IMC Corp will orchestrate a photo-shoot annually (or on as-needed basis) to secure fresh images and contents for social media (and print media).

4.6b IMC Corp will come up with ideas for short videos, etc. IMC Corp will upload videos to various social media platforms.

**4.7 E-Newsletter**

IMC Corp will assist the City with ideas for, and produce, a monthly **E-newsletter**.

**4.8 Analytics** (refer to example in Addendum 'A')

IMC Corp will provide the City Manager with weekly or monthly analytics, based upon the Client's preferences.

- a. IMC begins with various **Social media + Hootsuite analytics**; then creates graphs and charts "tailored" to the City's needs and City Manager's directives/expectations.
- b. IMC breaks these analytics down by posts (**views, likes, comments, questions, etc.**) to give the Client more comprehensive and detailed 'intel' as to which post(s) generate the most **traction**, etc.
- c. Where applicable, IMC links the posts back to the website, etc., so the Client receives a 'full picture' of the topics we are posting.
- d. As noted above, IMC builds into each platform a **FEEDBACK** loop, where-in visitors are encouraged to provide their feedback and/or ask questions.
  - Weekly reports include an overview of feedback (questions/comments) received from the community, and keep a '**Master List**' of all comments and replies.

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## Section 5.0

### How IMC interacts with SRI during a specific campaign (e.g., toward introducing a half-cent sales tax in Yucaipa)

This section is being included to demonstrate the benefits of having IMC partner with SRI, when needed. Typically, the process unfolds as follows:

#### 5.1 SRI builds the message strategy that MIRRORS the Core Values and Expectations of voters throughout the City of Yucaipa.

The initial step will involve crafting a central “story line” that will drive the entire Community Outreach effort. This story line will be predicated upon the *findings* from the BENCHMARK voter survey that was recently conducted by SRI; thus, it will MIRROR the collective **core values** and **expectations** of local voters; which are the two most robust drivers of decision-making (e.g., voting behavior). Obviously, SRI will use this ‘intel’ when assisting the City in crafting ballot language, as well as developing Message Strategies for Community Outreach designed to realize the goals and expectations of the City.

From a practical perspective, the entire Community Outreach effort will be designed in advance of anything being implemented; for example, each “post” and each “tweet” will be crafted and planned in advance of the Community Outreach effort being kicked off.

#### 5.2 Create a Q&A

As noted above, SRI will create a **Question & Answer** document, which can be used by individuals speaking on behalf of the respective Initiative. This document will include the key facts pertaining to the need for the revenue stream being requested (the ‘ASK’); but, without advocating either a YES or NO vote (which would be illegal). We’ll follow Joe Friday’s famous quote: “*Just the facts, Ma’am; just the facts.*”

#### 5.3 Press Kit

When needed, SRI will create a Press Kit that includes: (i) a Press Release, (ii) the Q&A, and (iii) pertinent photos designed to *tell the story* in a compelling fashion.

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#### 5.4 Create website linked to the home page of the City's Website

IMC will build a web site that will be linked to the home page of the City's Web Site. When a resident visits the City of Yucaipa's website, there will be a link to the campaign's web site, which will be managed by IMC staff. Why? Clearly, Yucaipa's employees are highly impacted with their daily responsibilities; as such, do NOT HAVE THE TIME to deal with the traffic that will be generated through the campaign's web site...for example, responding to questions (or other feedback) from constituents regarding the respective ballot Initiative.

Instead, as noted above, IMC's personnel will manage the campaign's website, post stories, send out tweets, respond to inquiries regarding the Initiative at hand, et al. It must be emphasized here that IMC personnel will send out NOTHING that is not **pre-approved** by the Client; in the present case, the City Manager OR his designee...thus, the City will remain in COMPLETE CONTROL at all times.

#### 5.5 News Tabloid

The public outreach effort typically includes at least one (1) direct mail piece, sent to every household in the City. Often, this is in the form of a News Tabloid, printed on newspaper stock, and "tailored" to the Client; entitled: **Yucaipa News, Yucaipa Times**, or another name that implies "news journal" vs. advertising or promotional piece.

In other words, rather than creating a multi-color, direct mail piece (which can create an erroneous perception that the City is spending unnecessary dollars), SRI will create a **4-page, news tabloid**...printed on basic newspaper stock. This approach transforms the public outreach effort from being perceived as a promotional and/or marketing effort (intended to influence the reader) to a newspaper (strictly intended to INFORM constituents regarding the Initiative at hand).

For example, one such news tabloid, entitled: **Delta News** (which Dr. Manross has shared with Yucaipa City officials), involved a highly successful effort on behalf of the City of Rio Vista, which secured over 81% YES vote, without advocating for either a YES or NO vote. We recently published three editions of a news journal on behalf of the North (San Diego) County Fire Protection District entitled: the **NCFPD Journal**; the impact of this publication has proven extremely positive, as anticipated.

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Should a decision be made to produce and mail something (e.g., a direct mail piece) in addition to the tabloid, SRI will write, design and produce it; we would envision this to be a traditional direct-mail piece. Also, these informational pieces can be produced in BOTH English and Español (or virtually any other language), if desired; that's not a problem (we routinely do just that).<sup>2</sup>

## 5.6 Social Media

As noted above, the effort to inform constituents regarding the Initiative asking local voters to authorize a half-cent sale tax in Yucaipa will be driven by the social media; this includes all of the platforms discussed above.

The public outreach effort will be pre-planned; as a result, City officials will pre-approve each and every post. The Community Outreach effort will continue through Election Day (whenever that turns out to be). Typically, the key elements of such a campaign will involve:

- 5.6a **Twitter:** Up to 3 posts weekly (updates); Tweets (with modified approach)
- 5.6b **Facebook:** 2-3 posts per week
- 5.6c **Nextdoor** (or equivalent): 1-2 posts per week
- 5.6d **Facebook Live:** monthly or bi-monthly

In order to maximize the impact for **Facebook Live**, we will work with the City Manager and any other "influentials" in your service area who would like to participate in this activity AND train them on using the Facebook Live platform.

**Facebook Live** is a tool that is becoming extremely popular among public officials throughout the United States; especially in California. For example, it is used by Police Chiefs, Fire Chiefs, City Managers, and Mayors to communicate directly with local residents. *Facebook Live* involves placing a "smart phone" on the desk and broadcasting (via live streaming) a message to local residents; then, taking questions from people who want to interact, directly, with government officials. It operates much like an on-line conference call; except, the spokesperson is on camera and those who ask questions do so by typing their questions and/or comments (in other words, participants are not on camera).

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<sup>2</sup> Typically, the Client has the resources for translating text from English to Spanish. However, if not, then SRI and IMC will handle this, but there will be a modest fee to pay translators.

## 5.7 Send bi-weekly "E-newsletters" via email

While continuously adding new contacts as the social media campaign progresses, IMC will produce a bi-weekly E-newsletter, distributed via e-mail, based upon pre-approved topics. Often these topics are fluid; however, as the campaign grows (particularly via Facebook and Nextdoor), "**hot topics**" often surface and are addressed in more detail via newsletters.

- 5.7a IMC will create a stunning template and send bi-weekly e-mail 'newsletters' to everyone on the City's E-mail Tree.
- 5.7b The E-mail tree will be constantly updated as the campaign progresses and a final list will be sent to Client at the end of the campaign for use, going forward.
- 5.7c Responses/questions to the E-newsletter will be added to IMC's weekly reports for the Client.

The impact of the Social Media, when properly employed, is **nothing short of amazing AND extremely inexpensive**, especially compared to direct mail and other methods of reaching out to the community.

## 5.8 Public presentations to community and civic groups/organizations and any other organization that may express an interest in hosting a meeting for their members.

SRI will produce a PowerPoint presentation that can be used to present to community and civic groups/organizations and other organizations that would like to learn more about the respective Initiative; for example, the local chapter of Rotary.

- 5.8a SRI will assist the City in developing a **SPEAKERS' BUREAU**, comprised of City Council members AND other stakeholders and Influentials from around the City in order to make presentations to community and civic groups/organizations, and any other organization that may express a desire to have a speaker present to their members.
- 5.8b SRI staff will work with City staff to help identify these organizations and arrange dates for these presentations. In order to meet the needs of these organizations, these presentations need to be scheduled well in advance of the presentation, of course.
- 5.8c In order to '**control the message**' as much as possible AND provide presenters with the substance of the PowerPoint presentation, SRI staff will produce **TALKING POINTS** to guide the presentation and follow-up Q&A.

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- 5.8d Presenters will take with them literature that can serve as “**take-aways**”; thus, spread the message as much as possible through this outlet.
- 5.8e SRI strongly recommends that someone from City staff accompany speakers; NOT as ‘advocates’ (that would not pass the proverbial ‘smell test’), rather, to answer technical questions...for example, how the money from a successful funding Measure would be spent, and why these monies are needed.

## Section 6.0

### Budget Parameters

Establishing budget parameters for the case at hand is rather straight-forward.

- IMC Corp’s monthly retainer for professional services rendered to the City of Yucaipa will be \$3,500 (\$42,000/yr). With the exception of any TRACKING POLLS that may be commissioned, this retainer fee includes SRI’s involvement in community outreach.
- Of course, there will be additional expenses that will be incurred; for example, there will be back-end maintenance costs such as Hootsuite, Constant Contact, and website maintenance (which cannot be avoided); these typically amount to approximately \$600/month (up to \$7,200/yr.) This could bring the cost to the City to \$49,200 annually.

The retainer does not include production fees and mailing costs for any print media (or other materials) that is authorized, such as the news journal or other direct-mail pieces. However, there will be NO addition cost to the City that is not AUTHORIZED in advance.

- There may be additional fees called for by the City; e.g., translation from English to Spanish, photography and/or video production. Here again, should this occur, each expenditure will have to be pre-authorized by the City Manager (or his designee)...thus, remain within whatever budget parameters have been established by the City.
- The above pricing assumes a minimum of a one-year contract.

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## Section 7.0

### Summary Conclusion

We have presented what we believe to be the most appropriate and cost effective approach to **Community Outreach** regarding the City's needs and expectations. IMC's approach to Community Outreach is comprehensive, yet cost-effective. And, given the fact that we can partner with SRI, which is already part of the Yucaipa family...the approach being proposed here simply cannot be matched by any other Social Media organization.

IMC's Social Media services will be TAILORED to the needs and expectations of the City, as well as to the collective **core values** and **expectations** of the City's constituents; especially registered voters throughout Yucaipa.

Our approach is embedded in well-established **CONSENSUS-BUILDING** and Best Practices methodologies, especially given the legal constraints that **MUST** be adhered to when placing an Initiative on the local ballot.

We're confident that the City of Yucaipa simply cannot receive a better ROI (*Return on Investment*) than it will receive through commissioning IMC Corp to partner with you and SRI, going forward.

We look forward to learning of your decision and, hopefully, to begin working with the City of Yucaipa in the near future.



**Addendum 'A'**

Information re: Renewal of Measure 'O', City of Rio Vista  
**Social Media Activity Report**



**Measure 'O' won with 81.09% voting YES**

Context: City of Rio Vista Population = 7,360; Registered voters ≈ 5,000; Outcome = 81.09% YES

 **Website Posts**

Description	Total
Total Page Views	1,098
Favorite post:	92

 **Nextdoor**

Description	Total
Thanks	191
Comments	208
Responses	140

 **Facebook**

Description	Total
Total Likes	55
Page Engagement	671
Questions	10
Total Activity	7,769

 **Instagram**

Description	Total
Likes	80
Posts	38
Followers	46
Shares	1
Total Activity	126

 **Email Blasts**

Description	Total
Emails sent	11,148
Opens	2,302
Click through	97
Unsubscribes	39

Total Activity	2,302
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 **Twitter**

Description	Total
Tweets	100
Followers	34
Likes	2
Comments	3
Impressions	2,001
Shares	3
Total Activity	2,143

 **Press Releases**

Description	Total
Rio Vista Beacon	5,000
Rio Vista - Daily Republic	27,195
Patch.com	2,550
Total Activity	32,195

 **Facebook Live**

Description	25-Oct	Total
Total Likes	13	13
Page Engagement	19	19
Questions	9	9
Total Activity	90	90

**Final Summary**

Description	Total
Total Activity:	46,178

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## Information re: Renewal of Measure 'O', City of Rio Vista

# Social Media Activity Report

### Measure 'O' won with 81.09% voting YES



Obviously, we are extremely pleased that Measure 'O' passed, overwhelmingly. Here's how to measure the impact of the social media campaign on voting behavior...

SRI's BENCHMARK scientific voter survey (based upon SRI's **Go, No-Go model**) predicted the following:

- **Likely** voter support: **69%** (100% of definite YES + 50% of probably YES)
- **Potential** voter support: **82%** (100% of definite YES + 100% of probably YES)

This means that we not only captured 100% of the definite support; but, we secured 99% of likely voter support. In other words, SRI's public outreach effort was a huge success; we got every vote possible...and, we never advocated for a YES vote!

- Total activity for Oct. 31 – Nov. 9 was 36,645 impressions with 50,878 impressions generated for the entire campaign.
- The most reach of our efforts this period is newspapers with results of the elections **24,306 impressions** (not including online, social networks & our direct mailer). **Total measured newspaper impressions for the campaign is 32,195.**
- The next most popular and the most interactive social media is **Facebook** with **5,946 impressions** and **481 engagements** for the week-and-a-half. We believe this significant jump was due to the election and people looking at the site Measure O Information. **We generated 7,769 impressions and 671 page engagements for the campaign.**
- **Our direct mailer, a news tabloid, reached 5,000 residents (registered voters)**
- **Twitter generated 583 impressions and 3 new followers.** *We added the category of impressions to Twitter and included the history from Week 1 to the present.* The campaign created **2,143 impressions and 34 followers.**
- **Email Blasts** resulted in 571 people opening two emails sent on Tuesday, November 1. The 2nd Email Blast was sent Tuesday, November 8. **Total number of emails opened for the campaign is 2,302, with 97 click through rate.**
- **Nextdoor** had the most interpersonal communication, with residents asking 208 questions throughout the campaign.
- There was great interest in the Measure 'O' story as residents' opened emails, engaged the various social media platforms, read stories and viewed the Rio Vista Measure 'O' page on the City's website. Engagement growth jumped this week to 4,328 from 2,434 last weeks' (not including newspapers). Clearly, the 46,178 impressions generated for the entire campaign directly impacted voting, which is documented by the fact that Measures 'O' secured over 81% YES vote.



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## Addendum ' B'

### Biographical Sketches

#### Shanna Bowen President

**Shanna Bowen** has more than a decade of experience in both the public and private sectors in various facets integrated marketing communications (including public relations, advertising, and promotions); in both the United States and London, England. She is an expert in applying the various Social Media platforms.

Ms. Bowen was brought into the SRI family of companies approximately two years ago, through IMC Corp., in order to expand SRI's Social Media offerings. In fact, Shanna's application to the Social Media is credited (in large part) with the huge success in the City of Rio Vista's campaign to extend an existing sales tax, which garnered over 81% voter support. She continues to deliver unprecedented results through the proper use of the Social Media; for example, on two current campaigns...one on behalf of the North (San Diego) County Fire Protection District and the other on behalf of the City of Soledad.

Shanna began her career as a virtual assistant, specializing in marketing communications and public relations. She moved to the lending, title, and investment industries in account management, handling both inside and outside sales for such firms as United Title. She entered into the world of Social Media, full force, when she was Executive Assistant to the CEO of **eLender Services**, headquartered in Orange County, and **MHS Capital Management, LLC.**, headquartered in San Francisco.

Ms. Bowen is proficient in both MAC and PC platforms. Her computer skills include, but are not limited to, Microsoft Word, Excel, PowerPoint, Outlook, graphic design using various software packages including Photoshop, SPSS (statistical package), Closing Point, Salesforce, Data Quick, Trackvia and ATOMS Technology (sales tracking programs), QuickBooks, plus a host of proprietary software for database management. She is adept at setting up live on-line Webinars to introduce new products and ideas into the respective Industry; including creating informational, promotional and marketing materials.

With regard to public service and contribution to community, Ms. Bowen worked with the **Orange County Public Defender's Office**, where she interviewed juvenile offenders (who were incarcerated) and prepared documentation for the attorneys assigned to their respective cases. She has experience in event planning and fund raising for such organizations as **Run for Teachers**, organizing a run for charity, where the yield was used to fund a program called *Teach with Africa*, promoting global awareness and interest in career opportunities for those in developing nations.

While living in London, England, she was an Executive Assistant to a celebrity chef, Vivek Singh, who owns five high profile restaurants, the most prestigious being, **Cinnamon Club**. Shanna handled the Social Media for these restaurants and the celebrity chef; built the organization's web site; oversaw the opening of a new restaurant; and assisted in producing and promoting two world-class cookbooks.

She has two undergraduate degrees; one in Liberal Arts, plus her B.A. in Political Science from California State University, Long Beach, CA.



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**Mary Ann Williams, M.A.**  
Executive Vice President  
**SRI FAMILY OF COMPANIES (including IMC CORP)**

**Mary Ann Williams** oversees the administrative support services for every Client project. She has been with the family of companies (including IMC Corp and SRI) for more than two decades.

Ms. Williams has well over two decades of experience in communication management, administration (including human resource management), and related areas. She is an expert in statistical analysis and data management.

Ms. Williams earned her B.A. and M.A. degrees in Sociology at California State University, Fullerton, and California State University at Los Angeles, respectively.

Mary Ann is responsible for Client services. In so doing, she works personally with virtually every Client to ensure that all of their needs are being addressed in a comprehensive and timely fashion.

As such, Ms. Williams functions as a primary contact person for our family of companies.



**Dr. G. Gary Manross, Ph.D.**  
Chairman/CEO  
**FAMILY OF COMPANIES INCLUDING IMC CORP & SRI**

A behavioral scientist, **G. Gary Manross, Ph.D.**, has more than 25 years' experience in applied research (policy research, political research, and marketing research), and as a consultant in political communications, marketing communications, and communications management.

Prior to founding SRI, Dr. Manross held executive-level positions with the largest public relations firm in the world, Hill & Knowlton, Inc., the largest state trade association in the United States, the California Association of Realtors®, plus two Fortune 500 companies, Diamond Shamrock Corporation (then 152 on Fortune 500) and Chase Brass and Copper Company.

Dr. Manross has taught political communications at UCLA, mass media effects at U.S.C., and was Associate Professor of Communications in the California State University system, where he held a joint appointment in Advertising and Public Relations. He was the head of the Advertising Sequence when he left academe; during this period, he taught courses in applied research, integrated marketing communications (IMC), management, advertising, and public relations at both the undergraduate and graduate levels.

Dr. Manross' publishing record includes numerous refereed academic journals, including the *top-ranked paper* internationally in the Human Communications Technology Group of the International Communication Association (ICA), which was subsequently published as a chapter in **Communication Yearbook 10**.

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His research is routinely cited in both the scholarly and popular press and in classic textbooks, such as **Diffusion of Innovations** (Everett M. Rogers, 1995, 4<sup>th</sup> ed., Free Press, N.Y.). Dr. Manross is author of a paper developed in a joint effort with Dr. Rogers that will soon be submitted to the Harvard Business Review. He also authored a book entitled: **The Impact of Theory-driven Public Opinion Research in Strategic Planning for Winning Campaigns**, Carlton Press, NY, 1995. He is presently writing a second book entitled: **Closing the Chasm**.

Dr. Manross' academic credentials include two undergraduate degrees, one in Journalism and a B.A. in Public Relations from University of Southern California (USC); an M.A. in Communications Management, an M.A. in Communications Theory, and a quantitative Ph.D. in Communication Research, with a dual emphasis in Political Communications and Media Effects, from the USC Annenberg School for Communication and Journalism.



**Addendum 'C'**



**IMC Corp/SRI  
Professional References**

**Mr. Matt Rodriguez**

City Manager

**City of San Pablo**

3831 San Pablo Avenue

San Pablo, CA 94806

510 ♦ 215-3016 (direct line)

[MattR@sanpabloca.gov](mailto:MattR@sanpabloca.gov)

**Chief Steve Abbott**

Fire Chief and CEO

**North (San Diego) County**

**Fire Protection District**

330 S. Main Avenue

Fallbrook, CA 92028

760 ♦ 723-2005 headquarters

[sabbott@ncfire.org](mailto:sabbott@ncfire.org)

**Mr. Pat O'Brien**

General Manager, Recently Retired

**East Bay Regional Park District**

510 ♦ 612-2093 (cell)

415 ♦ 479-7633 (home phone)

[PatO'Brien6@hotmail.com](mailto:PatO'Brien6@hotmail.com)

**Mr. Tony Boren**

Executive Director

**Fresno County Council of Governments**

*(Fresno County and 15 Cities in the County)*

2035 Tulare Street, Suite 201

Fresno, CA 93721

559 ♦ 233-4148

[tboren@fresnocog.org](mailto:tboren@fresnocog.org)

P.O. Box 1724  
Lake Arrowhead, CA 92352

**(800) 224-7608**

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