

April 2, 2026

County of Monterey  
168 West Alisal Street 3<sup>RD</sup> Floor  
Salinas, CA 939012

Sent via email

**Re: Strategic Services for Ballot Measure Feasibility**

Dear County of Monterey Team:

Thank you for the opportunity to submit this proposal to support your efforts to explore the feasibility of two potential future ballot measures (a potential Real Property Transfer Tax – RPTT, and a potential Transient Occupancy Tax - TOT) in the unincorporated portions of Monterey County. We look forward to partnering with you. The following is a short proposal outlining our capabilities, general approach, and cost.

**Why CliffordMoss:**

CliffordMoss is a boutique strategic communications and ballot measure consulting firm committed to collaborative, creative, and customized service. With decades of experience, our team has helped public agencies and community partners successfully prepare and win local, regional, and state revenue measure campaigns – including deep experience with county, city, and school ballot measures across California.

**Proven results.** Our team has extensive experience with revenue measure campaigns across the state, in the Bay Area, and in Monterey County. In fact, we were the team brought in to help the Transportation Agency for Monterey County (TAMC) with Measure X after four previous teams had failed. We know Monterey County and we know how to craft and deliver messages that resonate with your residents when stakes are high.

**Tailored approach.** We avoid one-size-fits-all strategies, instead we listen closely and design approaches that reflect the unique needs of each client and community.

Our passion is helping strengthen our communities—one project at a time. We are eager to bring our experience and energy to the County of Monterey.

Sincerely,



Tom Clifford  
Principal, CliffordMoss LLC  
510-847-7155 / tom@cliffordmoss.com

## 1. About CliffordMoss

**Firm Information:** Our key company information is as follows:

**CliffordMoss, LLC**

5111 Telegraph Avenue, No. 307  
Oakland, CA 94609

Firm Structure: LLC – Limited Liability Company  
510-907-3195 / info@cliffordmoss.com  
Founded in 2012 (14 Years in Business)

**Primary Contact:**

**Tom Clifford**, Principal, CliffordMoss  
Cell: 510-847-7155  
Email: tom@cliffordmoss.com

At CliffordMoss, **our passion is building better communities** by providing expertise and guidance in stakeholder engagement, political navigation, and strategic communications. We are committed to collaborative, creative, and customized client service. And because everyone has a unique story to tell, we've dedicated our firm to helping clients tell their stories in a way that attracts lasting support.

We have worked successfully alongside local public agencies and elected officials throughout the Bay Area, including in Monterey County.

Our team is driven by three core principles:

**YOUR community is unique ♦ Listening is a lost art ♦ People support what they help create**

We use these principles to help you tell your unique story in an honest and compelling way. We use them **to help you engage, listen, and build relationships** - one conversation at a time. Most importantly, we use them to help you see opportunities through *a win-win* lens, so **you** inspire *others to rise* and champion your cause from the outside in. This is how we help you *win* in a genuine way reflecting your unique story.

## 2. Our Team

**Our team is well suited to help you achieve your electoral goals.** Together, we have decades of experience in all aspects of helping communities prepare for and pass local ballot measures. Here is more about us:

**Tom Clifford, CliffordMoss Founding Principal.** Tom is a seasoned political and election strategist with significant experience engaging and leading complex, diverse, must-win projects in the public arena. 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 and public policy at Princeton University. He later practiced public law and litigation at Bingham McCutchen in San Francisco for six years before moving into political consulting with a leading California firm and forming CliffordMoss in 2012 with partner Bonnie Moss. Tom enjoys tackling thorny political issues that tap his political strategy and legal expertise. He has guided winning campaigns across California, including many in the Bay Area and in Contra Costa County. Tom lived in Latin America for several years, speaks Spanish and Marathi (in addition to English) and has extensive experience guiding projects with multi-cultural and multi-lingual components. Tom grew up in Chico and now lives in Oakland with his wife and three children.

**CliffordMoss SUPPORT TEAM.** CliffordMoss employs a boutique team of professionals with expertise in community organizing, communications, online and social media expertise, media relations savvy, multi-lingual experience, and extensive print/production/direct mail capabilities.

### 3. References

#### Transportation Agency for Monterey County (TAMC)

Todd Muck, Executive Director, 831-775-4407

2016 Sales Tax WIN (67.7% YES)

#### County of Alameda

Elisa Márquez, County Supervisor District 2, 510-910-3833

Various County Measures and Chair of the City of Hayward’s successful 2018 RPTT Campaign (59% YES)

#### County of Imperial

Robert “Bobby” Benavidez, County Undersheriff, 760-540-1638

Currently working with CliffordMoss to plan for a Public Safety Sales Tax Measure in November 2026

*Additional references available upon request.*

### 4. Project Approach

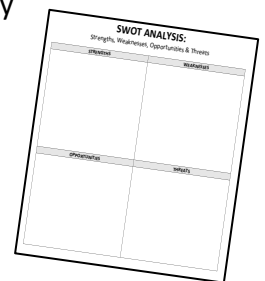
**As we begin our work, FIRST, we will make the time to listen to you.** At CliffordMoss, we believe LISTENING is a lost art. Many firms will come in and tell you exactly what you should do without getting to know who you are and what makes your County unique. We won’t do that. We will sit with you – and others you think we can learn from until we understand you, your needs, and the conditions that you believe will drive success in today’s election environment.

We will proceed along deliberate tracks using proven tools to navigate the way forward and this project may include two phases:

#### Phase 1: Feasibility (April 2026 through June 2026)

**Public Opinion Polling Support.** We understand you have already had some discussions with EMC Research. Great! We work well with EMC and will collaborate with them to support the feasibility research process.

**Political Analysis.** One of CliffordMoss’ most important responsibilities in the Phase 1 process is to analyze and anticipate with you the political terrain ahead to help you navigate the future successfully. No two communities are the same. We will work with you to conduct a series of political diagnostic exercises to improve our collective understanding of your political playfield and dynamics.



**Listening Strategy.** We deliberately make time to listen and learn from those most likely to influence the outcome of your measures. By employing our proven diagnostic tools, including opinion leader interviews and stakeholder meetings (whether in-person, via zoom technology, or conference call), we are better able to understand your stakeholders, and, most importantly, get an early understanding of **your voters** (the ultimate decision makers in the exercise ahead). We will also look at more recent political or electoral events, including high visibility Monterey County and/or statewide revenue measures.

**Our early Phase 1 Feasibility work together provides the CLARITY needed to navigate the way forward.** As we move through early listening, including polling and other strategic communications work, we will always refer back to the revealing data, letting the evidence tell us where to go next. This is why we resist making judgments on what will or won't work until we have concluded all aspects of early feasibility work.

There are 3 possible outcomes of the Feasibility Phase:

- ◆ **BEST: PROCEED TO BALLOT.** Feasibility is present. Continue to get “election ready.”
- ◆ **PROCEED WITH CAUTION.** Some but not all signs of feasibility are present. In this case, we may move forward; however, we may face some tough decisions to stay in alignment with what we know your Monterey County voters will support.
- ◆ **STOP – REGROUP.** If significant risks emerge out of the Feasibility process, we will tell you so – even if it means telling you that your vision to go to the ballot is overly ambitious and more time is needed to prepare your community for electoral success.

If feasibility is determined and the evidence shows the ballot measures are winnable, our process continues...

**Phase 1 will culminate** in us working closely with you, your community and your legal counsel to draft ballot measures that are crafted to be clear and compelling for your community and we will be by your side until your County Supervisors vote to place the measure on the ballot in June. This final element of the Phase 1 process will include the following:

- Collaborate with you, your county counsel, and other consultants on final ballot package components.
- Finalize core messaging (we know the words and format that work with best with voters!)
- Prepare your ballot language, including the all-important 75-word Ballot Question
- Provide input to/support your County Counsel and the County Registrars of Voters (ROV) to ensure that your ballot measure package filed is the right package for electoral success.
- Provide guidance on media efforts to help position the County effectively.
- Provide ongoing strategic counsel to help you navigate the political terrain.

## **PHASE 2: Public Education (July 2026 through September 2026)**

In Phase 2, which only occurs if your Board places a measure on the ballot, we will work closely with you to develop the educational materials needed to make sure your community understands the ballot measure(s) they will be voting on.

**During Phase 2, we employ educational messaging strategies to engage voters and stakeholders in compelling, memorable ways.** We help you take the time to listen and learn from those most likely to influence the outcome of your election. **PROVEN STRATEGIES** we use to engage, listen, educate, and build awareness include:

**“Outbound” Public Information & Communications Support.** We will review your existing communications operation at the County with a strategic lens to identify opportunities for improving educational impact; rapid-response capabilities/results; reaching additional audiences; engaging grassroots organizations and leaders to participate in the discussion through micro-networks; and customizing communications tools to facilitate more participation in the conversation, especially at the ground-community level.

CliffordMoss has many **proven tools** in our communications “tool kit”, including strategies to hold down costs while communicating effectively in a robust public outreach plan:

- Opinion leader and stakeholder work.
- Public meetings (virtual if necessary).
- Informational outreach.
- Direct mail.
- Traditional media.
- Web / online / social media.
- Messaging around key specific stakeholders.
- messaging around key specific stakeholders.



Reminder – this phase will run from the end of June when you place the measure on the ballot to the end of September and will focus on public engagement and education only. This phase only occurs if a measure is placed on the ballot at the end of Phase 1.

## 5. Recommended Scope of Services (For the Contractual Agreement)

### Phase 1: Strategic Communications, Election Feasibility Assessment and Ballot Measure Preparation Services

**TIMELINE: April 2026 through June 2026**

- Confer and collaborate with Client to set project schedule.
- Conduct a project kickoff meeting and provide an orientation of the process to Client leaders.
- Review available background material regarding Client needs and status, current communications efforts, and 2025 research results.
- Assess Client’s current public communications efforts as they relate to project electoral goal(s).
- Polling/Research: collaborate with Client’s pollster, to interpret and integrate recent election feasibility research into Client’s communications planning efforts for 2026. Work with pollster and Client to navigate timing and priorities on any additional tracking research needed.
- Help Client understand its options for early public engagement and LISTENING, and guide beta testing for such efforts.
- Conduct early community/political analyses relating to Client’s 2026 electoral goal(s).
- Recommend a strategy, timeline and budget to help Client engage, inform, gather and LISTEN to input from stakeholders on Client needs and proposed plan to meet those needs (2026 measure).
- Based on early polling/research results, provide input and thought partnership to Client to help ensure that uses of proposed revenue measure funds are aligned with community priorities.
- Attend and/or participate in Client project-related meetings and Zoom/conference calls as needed.
- Provide 2026 election feasibility recommendations for Client’s preferred local revenue measure(s).

**Contractor’s services do not include legal or financial advice or counsel of any kind.**

## PHASE 2: Public Engagement & Public Information During the Election Window

**TIMELINE: July 2026 through September 2026**

- Prepare Client for **information-only** communications environment once its measure has qualified for and is on the ballot (e.g. **factual, information-only** web content, fact sheets, FAQs, etc.).
- Prepare public **information-only** materials to inform the public of Client's measure on the ballot.
- Provide ongoing project-related strategic communications counsel as needed.
- Attend and/or participate in Client project-related meetings and Zoom/conference calls as needed.

**Contractor's services do not include legal or financial advice or counsel of any kind.**

## 6. Our Commitment to You

CliffordMoss will work with you to make prudent, smart decisions that position you effectively. YOU will always be in the driver's seat about all budget-related decisions. Our plan focuses on YOUR needs.

**Effective use of TIME** to meaningfully communicate with various stakeholders is valuable to both calibrate your communications and create streamlined methods of sharing information to use resources wisely.

## 7. Cost Proposal

Our fee structure is designed to allow us to bring the very best strategic guidance to you to achieve YOUR strategic and electoral objectives. Our clients tell us the investment in CliffordMoss is well worth it, given our record of doing the job once, doing it right, and getting it done.

**CliffordMoss Phase 1 Flat Fee:                      \$36,000**

This fee proposal includes all costs for project management, survey collaboration, strategy work, and core team meeting participation. Any program budget (mail, media, etc.) will be additional and that budget will be developed in collaboration with you. Our Phase 2 fee is \$30,000 but will only activate if a measure or measures are placed on the ballot at the end of Phase 1.

## 8. Thank You

Thank you for the opportunity to submit this proposal for the County of Monterey. We are eager to work with you. Our experience across the state on hundreds of ballot measures, as well as our knowledge navigating political success in Bay Area and communities throughout Monterey County has prepared us well to serve you in the important work ahead.

On behalf of all of us at CliffordMoss, we appreciate the opportunity to submit this proposal and we hope you share our enthusiasm for **letting us tell your story.**