
Ad Hoc Levy Committee Agenda
October 26, 2021 at 5 p.m. | CR 118

The Ad Hoc Levy Committee shall evaluate proposals and strategies related to levy preparations for 2022.

Expected Board Members: Dr. Hope Moon and Regan Phillips, Committee Co-Chairs
Karen Sutera, Michele Flanagan and Patricia Bell

Expected Staff: Nancy Kelsey, Michael Doud

1. Call to order
2. Presentations by prospective levy consultants
3. Close of meeting

As we discussed at our recent meeting, here is the communications survey that I suggest considering for fine-tuning and targeting communications during the coming year.

Although this was prospective, I have tentatively scheduled it to commence on September 20th. If you wish to proceed with it, let me know and I can propose a time line that includes a conference call to review and edit it, so we can make changes that you would like or Jens might need.

The cost will be \$15,500 which is a fully-inclusive rate that covers all aspects.

Let me know if the next week or so if this is something you wish to pursue.

Thanks,

Paul

First Draft

COMMUNICATIONS SURVEY

Lorain County, Ohio

Begins 9/20/2021, 5:00 P.M. E.S.T.

N=300, listed sampling of residential, VOIP and cell phone sub-samples

Hello, my name is _____. I work for Fallon (foul-un) Public Opinion Research. We are conducting a survey of attitudes about local issues and public policies affecting your community. **This is not a sales call and I am not selling anything** -- I merely want to ask you a few short questions. Your answers will be kept strictly confidential.

For example, please let me begin by asking...

(Cellular phone respondents)

S. 1. Our records indicate that I am speaking to you on a cellular phone. Can you talk right now, or would you be distracted from doing something that requires your full attention in order to do it safely, such as driving an automobile?

1. Yes – proceed
2. No - schedule call back
3. DK/NA - probe

(All respondents)

Q. 1. Generally speaking, would you say that Lorain County is going in the right direction, or has it gotten off onto the wrong track?

1. Right direction
2. Wrong track
3. Mixed/both (do not read)
4. DK/NA
0. Do not live in that county (do not read) – thank and terminate

Q. 2. Which of the following is the primary way you get your information about local government matters? Is it...

(randomly rotate)

1. Social media
2. Newspapers
3. The Internet
4. Radio news and programs...or...
6. Television news
7. All/combination (do not read)
8. Do not seek/get local government news (do not read)
9. DK/NA

Q. 3. Which of the following do you think should be the top priority for Lorain county leaders and elected officials to work on during the next two years? Is it...

(randomly rotate)

1. Bringing better paying jobs to the area
 2. Stopping illegal drug use
 3. Protecting the environment
 4. Lowering taxes
 5. Fighting crime
 6. Improving the schools...or...
 7. Proving mental health services and treatment
- (end rotation)
7. All/combination (do not read)
 8. Other (record - do not read)
 9. DK/NA

Q. 4. Including the online version that is available over the Internet, how often would you say that you read *The Chronicle Telegram* newspaper? Would you say that you read it frequently, occasionally, rarely or not at all?

1. Frequently
2. Occasionally
3. Rarely
4. Not at all
5. Do not have local daily newspaper in community (do not read)
6. DK/NA

Thinking more about local matters...

Q. 5. How would you rate the current state of the local economy? Would you say it is...

1. Good
2. Fair...or...
3. Poor
4. DK/NA

Q. 6. As a result of the coronavirus, have you or has anyone in your household lost employment or income during the pandemic?

1. Yes
2. No
3. DK/NA

Q. 7. Generally speaking, would you say that property taxes in the area where you live are too high, mostly pretty fair or too low?

1. Too high
2. Pretty fair
3. Too low
4. DK/NA

Looking more closely at taxes...

Q. 8. Do you agree or disagree with people who say that, regardless of how they feel about taxes, they are still willing to vote for levies that are for worthy needs and being spent properly?

1. Agree
2. Disagree
3. DK/NA

Q. 9. Generally speaking, for mental health services, such as counseling people with severe emotional problems and severe mental illnesses, would you say that Lorain County is spending too much, about the right amount or too little or, do you not have an opinion about the issue?

1. Too much
2. Right amount
3. Too little
4. No opinion
5. DK/NA

Q. 10. Looking specifically at levies for social and human services, such as elderly services, mental health treatment and programs, in the past, have you voted for all of them, some or none at all?

1. All
2. Some
3. None
4. DK/NA

Q. 11. As you may know the county has had several levies on the ballot in the past to provide funding for social and human services, such as elderly services, mental health treatment and programs. Do you think that the voting public should...(rotate)...continue to renew levies, since they assure stable funding for the treatment and services and do not increase taxes...or...stop renewing the levies, so taxes will be lower and there is money available for other needs in the community?

1. Continue to renew levies
2. Stop renewing the levies
3. Mixed opinion/some of both (do not read)
4. DK/NA

Q. 12. Thinking about the various ways in which the county uses its tax dollars and resources for social and human services, which of the following do you think should be the highest priority? Is it...

(randomly rotate)

1. Intervention for people with depression and thoughts of suicide
 2. Violence prevention programs to keep schools safe
 3. Emergency counseling for people who have experienced a disaster or traumatic event
 4. Job training to help emotionally disabled people become more self-sufficient
 5. Treatment for people with drug and alcohol problems
 6. Housing to help mentally disabled people integrate into mainstream society...or...
 7. Services to children with emotional problems
- (end rotation)
8. All/combo (do not read)
 9. Other (do not read)
 10. None (do not read)
 11. DK/NA

Thinking about various types of problems that affect some communities...

Q. 13. How much of a problem would you say that unemployment and economic hardship is in your community? Would you say it is a...

1. Very big problem
2. Somewhat of a problem...or...

3. Not a problem
4. DK/NA

(RANDOMLY ROTATE NEXT 5 QUESTIONS)

Q. 14. How much of a problem would you say that heroin and opioid abuse is in your community? Would you say it is a...

1. Very big problem
2. Somewhat of a problem...or...
3. Not a problem
4. DK/NA

Q. 15. How much of a problem would you say that mental and emotional illness is in your community? Would you say it is a...

1. Very big problem
2. Somewhat of a problem...or...
3. Not a problem
4. DK/NA

Q. 16. How much of a problem would you say that child abuse and neglect is in your community? Would you say it is a...

1. Very big problem
2. Somewhat of a problem...or...
3. Not a problem
4. DK/NA

(SPLIT SAMPLE – Random assignment to version A or B)

Q. 17A. How much of a problem would you say that suicide is in your community? Would you say it is a...

1. Very big problem
2. Somewhat of a problem...or...
3. Not a problem
4. DK/NA

Q. 17B. How much of a problem would you say that **teen** suicide is in your community? Would you say it is a...

1. Very big problem
2. Somewhat of a problem...or...
3. Not a problem
4. DK/NA

Q. 19. How much of a problem would you say that alcohol abuse is in your community? Would you say it is a...

1. Very big problem
2. Somewhat of a problem...or...
3. Not a problem
4. DK/NA

(end rotation)

Looking at a related topic...

(SPLIT SAMPLE – Random assignment to version A or B)

Q. 19A. Prior to this survey have you heard of the Lorain County Board of Mental Health? Follow-up, if yes: Based on what you know, do you have a favorable or unfavorable opinion of it?

1. Yes, favorable
2. Yes, unfavorable
3. Yes, mixed (do not read)
4. Yes, heard/no opinion (do not read)
5. No, never heard
6. DK/NA

Q. 19B. Prior to this survey have you heard of the Mental Health, Addiction and Recovery Services Board of Lorain County? Follow-up, if yes: Based on what you know, do you have a favorable or unfavorable opinion of it?

1. Yes, favorable
2. Yes, unfavorable
3. Yes, mixed (do not read)
4. Yes, heard/no opinion (do not read)
5. No, never heard
6. DK/NA

Finally, I have a few short questions for statistical purposes...

Q. 20. I would like to read you a list of age groups. Please stop me when I get to the one you are in.

1. 18 to 44
2. 45 to 64...or...
3. 65 and older
4. DK/NA

Q. 21. Which of the following do you consider to be your main race? Is it...

1. White
2. African-American
3. Hispanic or Latino
4. Asian or Indian...or...
5. Something else
6. Mixed race (do not read)
7. DK/NA

Q. 22. Do you own or rent your current home?

1. Own
2. Rent
3. Other (do not read)
4. DK/NA

Q. 23. Do you have any children under the age of 18 in your home?

1. Yes
2. No
3. DK/NA

Q. 24. Are you or is anyone in your household a member of a labor union?

1. Yes
2. No
3. DK/NA

Thank you very much for taking time to talk with me about these important questions. Have a nice day! Good-bye.

25) Respondent gender:

(Acquire by observation, ask only if necessary)

1. Male
2. Female

25) Partisan voting registration (append from sample file):

27) Past voting history (append from sample file):

28) Area (append from sample file):

1. City of Elyria

2. City of Lorain

3. Other suburbs/townships

29) Modeled digital/social media reachability (append from file):

TO: Michael Doud, Executive Director, Mental Health, Addiction and Recovery Services Board of Lorain County

FROM: Roetzel Consulting Solutions and JS Strategies

DATE: August 31, 2021

SUBJECT: Strategic Communications Proposal

There are both significant challenges and real promise ahead. The right communications, engagement, and implementation strategies can solidify and enhance the overall effectiveness and reputation of the Mental Health, Addiction and Recovery Services (MHARS) Board of Lorain County, to advance your goals during the upcoming levy cycles. We provide valuable expertise that supports the MHARS Board staff to achieve the vision and goals which we have discussed.

The objective of this engagement is to be a partner to accomplish the strategic communications priorities of the MHARS Board and to expand and enhance outreach and engagement with the community. We will achieve these objectives by (1) working in partnership with the MHARS Board and Administration as a dynamic resource, (2) developing a proactive, comprehensive, and strategic communications plan, (3) investing in a robust paid media, earned press, and social media strategy, and (4) helping the Administration execute the communications plan in alignment with the strategic plan.

With JS Strategies having worked with the former Lorain Mental Health Board and with Roetzel Consulting Solutions' local expertise, we are committed to the future success of the MHARS Board and believe that we are uniquely qualified and positioned to fulfill the deliverables outlined below. We look forward to discussing next steps with you. Please do not hesitate to contact us if you have any questions, comments, or concerns.

Thank you.

Comprehensive Scope of Services

Maximizing public brand awareness and credibility are important objectives of the MHARS Board. While we offer extensive expertise and experience, we also know that each situation is unique and requires a specific approach. We offer a distinct understanding of the current environment of the community and combine that with expertise designing a process that will produce the necessary insights and information the MHARS Board needs to accomplish your short- and long-term goals.

In an effort to assist the MHARS Board of Trustees and Administration in making decisions regarding funding possibilities, we suggest the following services and timeline:

Research and Leader Engagement (Phase One – Four Months)

- **Assist with a Statistically-Accurate Phone Polling**
Under separate contract, we will work with your pollster and help identify and draft questions designed to assist the Board in deciding the best course of action for MHARS. Please note that the polling will be conducted by an independent third party under separate contract.
- **Conduct Interviews with Local Leaders**
We will create an interview guide designed to facilitate conversation with community leaders about MHARS's past communications efforts, what worked, what could be better, impressions of funding and service needs, and expectations about MHARS's plan for the future. Working with MHARS, we will suggest names for interviews, conduct the phone interviews and analyze the results looking for themes and areas for improvement, reinforcement and update.
- **Conduct Online Surveys**
We will write, conduct and analyze surveys focused on three constituencies: customers, staff and residents. The customer and staff surveys will include greater emphasis on what services and programming are needed from MHARS, what is working and what could be improved. The resident survey will gauge community perceptions about the organization, performance, positives and negatives, and any impressions about what is needed for MHARS moving forward. The resident surveys will also test the types of information respondents would like to hear about MHARS.
- Distribution and stakeholder buy-in is key to the success of an online survey and we will suggest to MHARS the third-party partners who should be engaged to disseminate the survey link via their networks, social media and email lists. This process will reinforce that MHARS wants to engage their community and respond to community input in planning their future.

Analyze and Enhance Communications (Four Months Contemporaneous with Research and Leader Engagement)

- **Complete a Communications Audit**
We will audit past communications sent by and about MHARS and analyze how the messages were received and interpreted by the audience[s]. We will also review local media coverage, the website, social media and any available email or online analytics to identify traffic patterns.

- **Design a Comprehensive Communications Plan**
Using the information and insights gathered during the analysis, we will work with your communications team to design a comprehensive communications and marketing plan that supports the goals of MHARS and compliments the strategic plan. This includes designing and helping to execute paid media outreach programs to communicate with key constituencies.
- **Create Effective Messaging**
We will create effective and efficient messaging to proactively explain current positioning and respond in day-to-day situations. We will help create presentations, talking points, questions and answers, press releases, and fact sheets to educate the community about what is at stake and the potential next steps.
- **Provide Communications Advice and Counsel**
We will help ensure that communications are succinct, effective and timely and we will help continue to build social media presence, email lists, phone lists and third-party information sharing networks including elected officials, businesses, local stakeholders, parents and alumni. We will provide strategic counsel for budgets, priorities, strategies, and tactics for strong, consistent, and transparent communications as requested.
- **Conduct Legal Review of Funding Options**
Under separate contract, if requested, we will engage outside counsel (either Roetzel & Andress LPA or your outside counsel firm) to analyze election deadlines, financing options, and the pros and cons of each.
- **Analyze Past Election Results**
We will review and analyze past levy results, identifying any areas for improvement or outreach to ensure the best chance for success.

Community Engagement and Outreach (Phase Two – Three to Six Months)

- **Support Community Engagement and Outreach.** We will help identify and continue building relationships with community groups and organizations needed to share an educational message about MHARS and potential funding.
- **Build Advisory Committee.** We will help identify and reach community leaders to ensure broad and diverse supporters throughout the county.
- **Update as Needed.** Things change. Planning and execution are fluid processes and we will continually refine and update our approach to maximize our community impact. Simply put, we will do what it takes to ensure that MHARS makes an informed, research based, decision about funding options.

Background

Galen L Schuerlein, Director, Roetzel Consulting Solutions

As Director of Roetzel Consulting Solutions, Galen focuses on providing comprehensive strategic solutions for public, private, and nonprofit clients at the state and local level. She creates realistic, holistic, strategies that encompass legal, communications, and political considerations. Galen has provided strategic counsel to public entities, non-profits, businesses, local school districts, libraries, private corporations and trade associations reach their specific goals. Additionally, she has extensive experience in traditional governmental relations and positioning. Galen has been involved in the political process for decades and understands issues unique to entities affected by local, state and federal government and policies.

Galen's professional experience provides a unique perspective on the interactions between private sector and government. Prior to her consulting career, she was the Chief Counsel for the City of Cleveland, managing all collective bargaining, labor and employment, real estate development, and public records law sections. She also served as an Executive Assistant to the Mayor of Cleveland focusing on communications and labor relations. Galen began her legal career as a guardian ad litem, later moving to the Cuyahoga County Prosecutor's Office where she served as an Assistant Prosecuting Attorney representing Children and Family Services. In that role she prosecuted neglect, abuse, and dependency complaints.

While she is a licensed attorney and admitted to the Bar in Ohio, Galen is not providing legal advice in her role as Director of Roetzel Consulting Services.

Jens Sutmoller, Principal, JS Strategies

Jens Sutmoller is a public affairs consultant based in Cincinnati, Ohio with more than fifteen years of experience in government, non-profit, and political communications. He has managed public affairs issues for public-school districts, career centers, hospitals, mental health boards, zoos and other institutions throughout Ohio.

Jens graduated from Miami University (Political Science, Economics) where he was student body president. Jens is married to wife Jenni, and they share the joy of raising their two sons, Augie and Hugo.

Jacob Ross Hamblin, JS Strategies

Jacob Ross Hamblin is a strategic organizing operative and Ohio native with six years of experience across five states, including campaigns for School Board, Congress, US Senate, and President. Jacob has a successful track record building and executing community organizing and coalition expansion programs.

Proposed Fee

The JS Strategies and Roetzel Consulting Solutions Team will work in collaboration for a monthly fee of \$10,000 for ten months, continuing as requested month-to-month until cancelled by either party with 30 day written notice.