

ROSEVILLE
REQUEST FOR COUNCIL ACTION

Date: April 18, 2016
Item No.: 15.a

Department Approval

City Manager Approval



Item Description: CTV North Suburbs Strategic Direction Discussion

BACKGROUND

The Board of Directors of CTV North Suburbs is asking for input from member cities as part of its strategic planning process currently underway. They are looking at ensuring that CTV North is meeting the needs of the member cities and its residents. To that end, CTV North has hired Barbara Raye to facilitate discussion with each member City Council to gather input. Included with Attachment A are questions that CTV would like input on as well as background material on CTV North's operations.

POLICY OBJECTIVE

City Council input into the strategic direction of CTV North will help ensure that its operations meet the needs of the community.

FINANCIAL IMPACTS

At this point, there is not a direct financial implication. The final strategic direction of CTV North Suburbs may lead to increase or decrease in city contribution for its services.

STAFF RECOMMENDATION

Staff recommends providing input into the strategic direction of CTV North.

REQUESTED COUNCIL ACTION

Provide input into the strategic direction of CTV North operations.

Prepared by: Patrick Trudgeon, City Manager (651) 792-7021

Attachments: A: CTV North Background Material

Pat Trudgeon

From: Coralie A. Wilson <cwilson@ctv15.org>
Sent: Tuesday, April 12, 2016 4:44 PM
To: Pat Trudgeon
Subject: Material for April 18 work session
Attachments: strategic planning - background material.pdf

Pat –

As part of its strategic planning process, the Board of Directors of CTV North Suburbs is looking at the services we provide. We want to ensure that, over the next few years, we are meeting the needs of our constituents as effectively and efficiently as possible.

We appreciate the opportunity to have an informal conversation with your city council about the video programming and technical services we provide to the city and to the residents of Roseville. We are also seeking input from the councils of the other member cities, from the three school boards and from community organizations and agencies with whom we have worked. Our facilitator, Barbara Raye, the Executive Director of the Center for Policy, Planning and Performance, will be leading the discussion with you.

We have prepared some material to help the council members understand the North Suburban Communications Commission and CTV North Suburbs, their sources of funding, and information on our primary services – programming/video production and training. We have also pulled out key findings from the two telephone surveys that were conducted on our behalf last year. (A list of programs produced last year and the complete survey reports are also attached for those who want more detail.) In addition, here is a link to a short video that shows some of our activity for 2015 -- <https://vimeo.com/160386675>. We would like to open the discussion with the video.

We would also like the council members to think about the following questions once they have reviewed the informational material provided:

1. Do you have any general questions about CTV that are not addressed in the materials?
2. Of the services that CTV provides for local government, i.e., the city, which do you think are the most valuable?
3. What additional services or programs could CTV offer that would enhance civic engagement and transparency in local government?
4. Of the services that CTV provides for the community, which do you think are the most valuable?
5. What additional services or programs could CTV offer to improve the sense of community or enhance the skills/knowledge that residents gain through our educational and community programming?
6. What services and/or programs should CTV no longer provide?
7. What changes would you like to see in the next three to four years?

Thank you for your participation in our strategic planning process!

.cor wilson.

Coralie A. Wilson

Executive Director

NSCC/NSAC (CTV North Suburbs)

2670 Arthur Street

Roseville, MN 55113

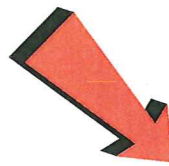
651-792-7512

www.ctvnorthsuburbs.org



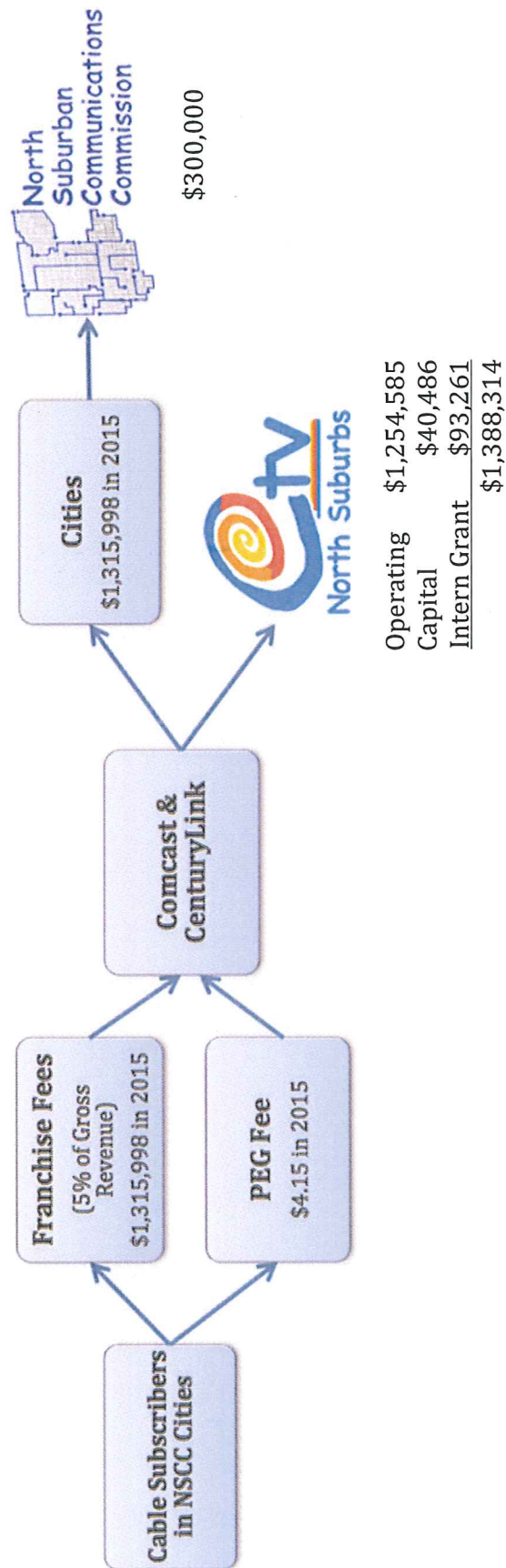
What is NSCC/CTV?

2 Sides of the Cable Franchise Coin



- Joint Powers Agreement (JPA) formed by 9 cities: Arden Hills, Falcon Heights, Lauderdale, Little Canada, Mounds View, New Brighton, North Oaks, Roseville and St. Anthony
- State & federal laws allow cities to enforce non-exclusive cable TV franchises for use of city rights-of-way by cable providers
- Administers the cities' cable franchises
 - Handles complaints
 - Negotiates/renegotiates agreements
 - Audits cable providers' performance
 - Technical
 - Financial
- Nonprofit corporation formed by 9 NSCC cities
- Provides community programming and services
 - Administers the CTV Channels
 - Produces community programs
 - Staff produced
 - Volunteer produced
 - Provides studio, production truck and portable video equipment
 - Provides video education and training to community members

NSCC/CTV Funding



**North Suburban Communications Commission (NSCC) &
CTV North Suburbs/North Suburban Access Corporation Member Cities:**
 Arden Hills • Falcon Heights • Lauderdale • Little Canada
 Mounds View • New Brighton • North Oaks • Roseville • St. Anthony



What Does CTV Do?

Public, Education & Government Programming

Public/Community Programming

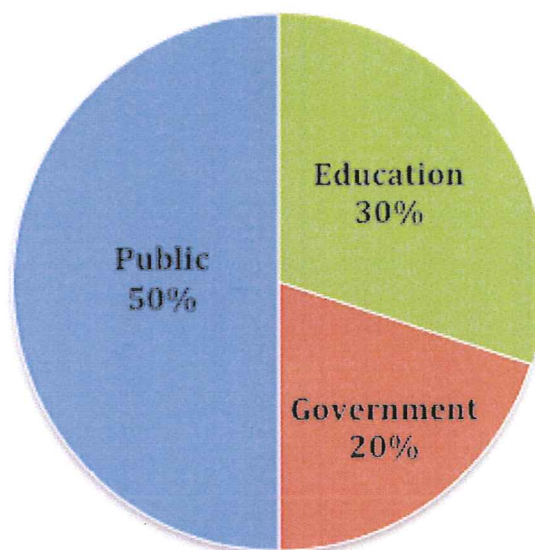
- Programs of local interest
- Examples of public/community programs:
 - *North Suburban Beat*
 - *Disability Viewpoints*
 - *Adventures in Public Speaking*
 - *4President Show*
- 362 programs in 2015
- **50% of total programs**

Education Programming

- Coverage of high school/college sports, concerts & events
- Examples of education programs:
 - *Chalkboard Capers (Mounds View)*
 - *Graduation Ceremonies (all districts)*
 - *Roseville Adult Education Culture Fair*
 - *Bethel Women's Chorale*
- Coverage of meetings (*not included in total*)
 - 21 school meetings in 2015
- 218 programs in 2015
- **30% of total programs**

Government Programming

- Coverage of local events, parades & festivals
- Examples of government programs:
 - *A Tale of the Cities*
 - *Candidates Speak Out*
 - *Mounds View Today*
 - *New Brighton Now*
- Coverage of meetings (*not included in total*)
 - 628 city meetings in 2015
 - 45 government meetings in 2015
- Municipal Assistance Program provides 100 hours of technical and production assistance per city per year at no charge
- Contractual services for cities & schools
 - Channel programming
 - Web streaming of meetings
- 146 programs in 2015
- **20% of total programs**



The Value Proposition for CTV North Suburbs

- ❖ A community media center that serves the public/community, education and government is more effective and efficient, saving money on equipment and staff. And it
- ❖ Enables open government and transparency in government operations by providing television and web coverage of local government meetings and events;
- ❖ Cultivates civic engagement and community building by providing an environment for collaboration between public/community, education and government programmers;
- ❖ Facilitates the sharing of diverse opinions, ideas and cultures; and
- ❖ Provides training in media literacy for young people and new English speakers.



Youth Media Program & Community Training

Youth Media Program

170	Students involved in youth media programs
53	Programs produced by youth
37	Students taught Northstar Digital Literacy Standards
11	Teen interns hired by CTV worked 1,000 hours

Community Training

Classes Offered in 2015:

34	CTV 101
23	Camcorder
14	Basic Truck Crewing
11	Final Cut Pro Editing
9	Basic Studio Production
4	Adobe Premiere Pro Editing
3	CG/XPression/Score
1	Producers Club Workshop
1	Teen Production/Animation
100	Total Classes Offered

Students Received Training in 2015:

170	CTV 101
126	Camcorder
57	Basic Studio Production
49	Basic Truck Crewing
31	Final Cut Pro Editing
28	Adobe Premiere Pro Editing
7	Producers Club Workshop
5	Teen Production/Animation
4	CG/XPression/Score
477	Total Students Received Training *

** 57 Students from Roseville Adult Education – English Learners Program*



Community Survey Results

Telephone survey results from the 2015 Addendum to the 2013 Community Needs Ascertainment Report, conducted by The Buske Group:

- ◆ **NEARLY HALF (47.3%)** of all cable subscribers have watched a program on a CTV North Suburbs channel. Of these viewers:
 - **52.4%** said they watched local sports, community and city programming on channels 14, 15 or 16 at least once a month (25.9% said at least once a week)
 - **84.7%** have watched City Council meetings (37% said at least monthly)
 - **64.1%** have watched local sports (29.6% said at least monthly);
 - **38.6%** have watched School Board meetings (4.2% said at least monthly); and
 - **37.6%** have watched "North Suburban Beat" (13.8% said at least monthly)
 - **40.7%** said they watched local government programming on channel 19 at least once a month (19% said at least once a week)
 - **23.3%** said they watched educational channels 18 or 20 at least once a month (7.9% said at least once a week)
- ◆ **A MAJORITY (72.5%)** gave grades of "A" or "B" regarding how well CTV North Suburbs "provides a valuable community service" and **61.9%** gave grades of "A" or "B" to "provides programming that deals with local issues."
- ◆ **A MAJORITY (69.8%)** of all telephone survey respondents said it is "important" or "very important" to have local cable TV channels that feature programs about area residents, organizations, schools, government, events and issues.

Conclusions from the 2015 Morris Leatherman Cable Subscriber Survey:

- ❖ CTV North Suburbs' broad spectrum of programming over the three cable channels reaches an impressive **61%** of subscribers. **9%** would be considered "frequent" viewers, while **52%** are "occasional" viewers. *This is above the norm of 52% in the Twin Cities area.*
- ❖ Subscribers are split on the importance of local city, school district and public access channels. **49%** consider them either "very important" or "somewhat important," while **50%** think they are "not too important" or "not at all important." However among the **61%** viewers of CTV North Suburbs programming, **62%** indicate they are important with only **38%** considering them of less importance.

2015 CTV Programs

P = Public

E = Education

G = Government

S = Staff

V = Volunteer

O = Outside Producer

**(non-resident producer, not
Produced at CTV North Suburbs)**

P/E/G	Public/Community	Episodes	S/V/O
P	14AA Baseball	1	S
P	4Presidents show	13	V
P	7th Grade Football: St. Anthony vs. Spring Lake Park	1	V
P	A Day Trip To Mars	1	V
P	Adventures in Public Speaking	11	V
P	Amateur Baseball	4	V
P	Celebrity Jeopardy	1	S
P	Christ the King Annual Christmas Concert	1	V
P	Christ The King Christmas Pageant 2015	1	V
P	Christ the King Lutheran Church	50	V
P	Community Open House Promo	1	S
P	Community Survey Promo #1 verA	2	S
P	Community Survey Promo #2	1	S
P	Crocheting Flowers-short	1	V
P	CTV 2015 Volunteer Recognition Awards (Banquet VRAs)	1	S
P	CTV Promo - Only Takes 10 minutes	1	S
P	CTV Social Media Promo	1	S
P	Denny Ross Memorial Softball (NB)	1	V
P	Disability Viewpoints	34	V
P	EveretteSmithson-July 4 2015	1	V
P	Focus Forward	11	V
P	Fridley 1965 Tornado Open Mic	2	V
P	Gathering Place Stables-short	1	V
P	GenCTV Promo	1	S
P	Harriet Island Park - short	1	V
P	Health Now	13	V
P	House Calls	21	V
P	Housing Diversity Seminar	1	S

P	How to Make Magic	1	V
P	How to play Guitar	1	V
P	Juggle Balls	2	V
P	Kad's Deli -short	1	V
P	Kiwanis Youth Awards 2015	1	V
P	Korean War Picnic 2015	1	V
P	La Pirinola	2	V
P	Legion Baseball	2	S
P	Light on the Gospel	12	V
P	Lynne 03 26:01	1	V
P	Mass of Thanksgiving @ Benedictine Featuring Bishop Lee	1	S
P	Men's Bandy North American Cup	1	V
P	Minnesota Conversations The Voting Rights Act	1	V
P	MN Harvest Horse Show 2015	1	V
P	MOFAS LIVE!	4	S
P	N.O. Garden Club Lymne's Disease	1	V
P	NET Lifeline	18	V
p	North Metro Home & Garden Show Promo	1	V
P	North Suburban Beat	47	S
P	Official State of MN Veterans Day Program	1	O
P	Ordination to the Priesthood	1	V
P	Paranormal Crossover (UFOs and the Paranormal)	1	V
P	Performing Hmong Qeej-short	1	V
P	Princess Whatshername-SJB 2015	1	S
P	Public Safety Spotlight	8	V
P	Rand Paul Stand with Rand Iowa Rally	1	V
P	RBB at Como Park	1	V
P	Roller Derby - North Start Roller Girls	6	S
P	ROMAFH League of Women Voters (LWV) Part 2	1	S

P	Roseville Big Band	6	V
P	Roseville Open Figure Skating	3	V
P	Roseville String Ensemble	4	V
P	School of Rock	3	V
P	Senior Softball All Stars	1	S
P	Shakespeare & Co	3	V
P	Shoreview Northern Lights Variety Band Holiday Concert 2	1	V
P	Softball (NB 1-pitch)	3	V
P	Songs of Hope	1	V
P	SPACC present Transportation for the 21st Century	1	S
P	Special Gift	2	V
P	Speedskating America Cup	2	V
P	Speedskating John Rose Open	2	V
P	St. Anthony Civic Orchestra 40th Anniversary Concert 2015	1	V
P	St. Anthony Orch Spring Benefit Concert	1	V
P	St. Rose 75th Anniversary Diamond Jubilee Mass	1	V
P	St. Rose Holiday Concert	1	V
P	Sticky Rice with Banana	2	V
P	The Awful Truth "Equal"	1	S
P	The Messenger	3	V
P	The Real Deal in Real Estate	6	V
P	The Splatter Sisters	1	V
P	Transforming Stigma Into Strength with Mike Veny	3	V
P	UFO and the Paranormal	1	V
P	Water Festival-short	1	V
P	What's Brewin	7	S
P	Womens College Hockey: Gophers vs. Huskies	1	S

Staff Produced	84
Volunteer Produced	277
Outside Produced	1
Public/Community Total	362

P/E/G	Education	Episodes	V/S
E	Bethel Women's Chorale	1	V
E	Chalkboard Capers 2015	1	S
E	Culture Fair 2015 Roseville Adult Education	1	S
E	Fairview Alternative HS Graduation	1	V
E	Graduation Promo 2015	1	V
E	Heads and Tails (Adult Education)	1	V
E	IDHS Everyone's Watching PSA	1	V
E	IDHS Irondale Athlete Alumni	1	V
E	Irondale High School Graduation Ceremony	1	V
E	Irondale Pops Concerts	1	V
E	Mounds View High School Graduation	1	V
E	Mounds View High School Speech Showcase	1	V
E	MV Chippewa Middle School Presents 7th Grade Spring Co	1	V
E	Mounds View High School Graduation Ceremony	1	S
E	RAHS All District Orchestra Festival	1	V
E	RAHS Concert Series I	4	V
E	RAHS Concert Series III	3	V
E	RAHS Winter Jazz Concert	2	V
E	Roseville High School Graduation Ceremony	1	S
E	SAHS Senior Band Concert	1	V
E	School Chamber Musical Recital District 621	1	S
E	St. Anthony High School Graduation Ceremony	1	S
E	St. John the Baptist School Holiday Concert 2015	1	S
E	St. Rose 2015 School Play	1	V
SPORTS			
E	Baseball: Irondale vs. Blaine	1	O
E	Baseball: Irondale vs. Fridley	1	S
E	Baseball: St. Anthony vs. DeLa Salle	1	V

E	Baseball: St. Anthony vs. St. Agnes	1	V
E	Baseball: St. Anthony vs. St. Paul Academy	1	V
E	Boys Basketball: Irondale vs. Park Center	1	S
E	Boys Basketball: Irondale vs. So. St. Paul	1	S
E	Boys Basketball: Irondale vs. Totino Grace	1	S
E	Boys Basketball: Roseville vs. Anoka	1	V
E	Boys Basketball: Roseville vs. Cretin DH	1	V
E	Boys Basketball: Roseville vs. Forest Lake	1	V
E	Boys Basketball: Roseville vs. Kennedy	1	V
E	Boys Basketball: Roseville vs. N. St. Paul	1	V
E	Boys Basketball: Roseville vs. Woodbury	1	V
E	Boys Basketball: St. Anthony vs. Mpls Edison	1	V
E	Boys Basketball: St. Anthony vs. St. Agnes	1	V
E	Boys Hockey: Irondale vs. Anoka	1	O
E	Boys Hockey: Irondale vs. St. Louis Park	1	O
E	Boys Hockey: Roseville vs. Cretin DH	1	V
E	Boys Hockey: Roseville vs. East Ridge	1	V
E	Boys Hockey: Roseville vs. Hermantown	1	V
E	Boys Hockey: Roseville vs. Mounds View	1	V
E	Boys Hockey: Roseville vs. Park CG	1	V
E	Boys Hockey: Roseville vs. WBL	1	V
E	Boys Hockey: Roseville vs. White Bear Lake	1	V
E	Boys Hockey: TotinoGrace vs. Breck	1	O
E	Boys Lacrosse: Mounds View vs. Centennial	1	O
E	Boys Lacrosse: Roseville vs. Cretin DH	1	V
E	Boys Lacrosse: Roseville vs. Park CG	1	V
E	Boys Soccer: Centennial vs. St. Anthony/SLP	1	O
E	Boys Soccer: St. Croix Lutheran vs. Concordia Academy	1	O
E	Boys Soccer: Totino Grace vs. Maple Grove	1	O

E	Boys Swimming: Roseville vs. Park CG	1	V
E	College Football: Bethel vs. Carleton	1	V
E	College Football: Bethel vs. Gustavus	1	V
E	College Football: Bethel vs. Hamline	1	V
E	College Football: Bethel vs. St. John's	1	V
E	College Football: Bethel vs. Wartburg	1	V
E	College Football: Northwestern vs. Iowa Wesleyan	1	V
E	Football: Andover vs. Totino Grace	1	O
E	Football: Blaine vs. Totino Grace	1	O
E	Football: Burnsville vs. Roseville	1	V
E	Football: Coon Rapids vs. Totino Grace	1	O
E	Football: Roseville vs. Cretin DH	1	V
E	Football: Roseville vs. East Ridge	1	V
E	Football: Roseville vs. Mounds View	1	V
E	Football: Roseville vs. Stillwater	1	V
E	Football: St. Anthony vs. Highland Park	1	V
E	Football: St. Anthony vs. Mpls Southwest	1	V
E	Football: St. Anthony vs. Washburn	1	V
E	Football: St. Anthony vs. Westonka	1	V
E	Football: Totino Grace vs. Anoka	1	O
E	Girls Basketball: Irondale vs. Blaine	1	S
E	Girls Basketball: Irondale vs. Coon Rapids	1	S
E	Girls Basketball: Irondale vs. Elk River	1	S
E	Girls Basketball: Irondale vs. Osseo	1	S
E	Girls Basketball: Irondale vs. St. Louis Park	1	O
E	Girls Basketball: Irondale vs. St. Louis Park	1	O
E	Girls Basketball: Roseville vs. Anoka	1	V
E	Girls Basketball: Roseville vs. Cooper	1	V
E	Girls Basketball: Roseville vs. Cretin DH	1	V

E	Girls Basketball: Roseville vs. East Ridge	1	V
E	Girls Basketball: Roseville vs. Mounds View	1	S
E	Girls Basketball: Roseville vs. Stillwater	1	V
E	Girls Basketball: Roseville vs. White Bear Lake	1	V
E	Girls Basketball: St. Anthony vs. Apple Valley	1	V
E	Girls Basketball: Totino Grace vs. Armstrong	1	O
E	Girls Hockey: Irondale vs. Blaine	1	O
E	Girls Hockey: Irondale vs. Champlin Park	1	O
E	Girls Hockey: Irondale vs. Spring Lake Park	1	O
E	Girls Hockey: Roseville vs. Centennial	1	V
E	Girls Hockey: Roseville vs. Edina	1	V
E	Girls Hockey: Roseville vs. Minnetonka	1	V
E	Girls Hockey: Roseville vs. Mounds View	1	V
E	Girls Hockey: Roseville vs. Mounds View	1	V
E	Girls Hockey: Roseville vs. Tartan	1	V
E	Girls Hockey: Roseville vs. Woodbury	1	V
E	Girls Hockey: Totino Grace vs. North Metro	1	O
E	Girls Lacrosse: Irondale vs. Coon Rapids	1	O
E	Girls Lacrosse: Roseville vs. White Bear Lake	1	V
E	Girls Soccer: Centennial vs. St. Anthony/SLP	1	O
E	Girls Soccer: Totino Grace vs. Maple Grove	1	O
E	Girls Swimming: Roseville vs. Woodbury	1	V
E	Girls Swimming: St. Anthony vs. Mpls. South	1	V
E	High School Football: All-Star vs. Game	1	O
E	HS All-Star Baseball: West vs. North	1	O
E	JV Boys Basketball: Irondale vs. Coon Rapids	1	S
E	JV Boys Basketball: Irondale vs. Osseo	1	S
E	JV Boys Basketball: Irondale vs. Park Center	1	S
E	JV Boys Basketball: Irondale vs. So. St. Paul	1	S

E	JV Boys Basketball: Irondale vs. Totino Grace	1	S
E	JV Girls Basketball: Irondale vs. Elk River	1	S
E	JV Girls Basketball: Roseville vs. Mounds View	1	S
E	Robotics: FIRST Regionals vs. @ U of M	1	V
E	Section Baseball: Roseville vs. So. St. Paul	1	V
E	Section Baseball: St. Anthony vs. Harding	1	V
E	Section Boys Basketball: Roseville vs. Mahtomedi	1	V
E	Section Boys Hockey: Mounds View vs. Hill Murray	1	O
E	Section Boys Hockey: Roseville vs. Mounds View	1	S
E	Section Football: St Louis Park vs. Irondale	1	O
E	Section Girls Basketball: Irondale vs. Osseo	1	S
E	Section Girls Basketball: Roseville vs. Tartan	1	V
E	Section Girls Basketball: Roseville vs. White Bear Lake	1	V
E	Section Girls Hockey: Irondale vs. Champlin Park	1	O
E	Section Girls Hockey: Mounds View vs. Blaine	1	O
E	Section Girls Hockey: Roseville vs. Cretin DH	1	V
E	Section Girls Hockey: Roseville vs. Tartan	1	V
E	Section Girls Soccer: Coon Rapids vs. Irondale	1	O
E	Section Softball: Irondale vs. Spring Lake Park	1	O
E	Section Softball: Irondale vs. Totino Grace	1	S
E	Section Softball: St. Anthony vs. St. Paul Johnson	1	V
E	Section Volleyball: Irondale vs. Mahtomedi	1	O
E	Section Volleyball: Roseville vs. Mounds View	1	V
E	Section Volleyball: Roseville vs. Stillwater	1	V
E	Section Volleyball: Roseville vs. Totino Grace	1	V
E	Softball: Irondale vs. Coon Rapids	1	O
E	Softball: Irondale vs. Maple Grove	1	S
E	Softball: Roseville vs. Cretin DH	1	V
E	Softball: Roseville vs. Mounds View	1	V

E	Softball: Roseville vs. Stillwater	1	V
E	Softball: St. Anthony vs. Columbia Heights	1	V
E	Softball: TotinoGrace vs. Maple Grove	1	O
E	State Boys Basketball: Roseville vs. Shakopee	1	V
E	State Girls Soccer: Mounds View vs. Centennial	1	O
E	Volleyball: Andover vs. Irondale	1	O
E	Volleyball: Fridley vs. St. Anthony	1	V
E	Volleyball: Irondale vs. Coon Rapids	1	O
E	Volleyball: Roseville vs. Forest Lake	1	V
E	Volleyball: Roseville vs. Mpls Southwest	1	V
E	Volleyball: Roseville vs. Rosemount	1	V
E	Volleyball: Roseville vs. Stillwater	1	V
E	Volleyball: St. Anthony vs. Brooklyn Center	1	V
E	Volleyball: St. Anthony vs. Columbia Heights	1	V
E	Volleyball: Totino Grace vs. Osseo	1	O
E	Volleyball: White Bear Lake vs. Concordia Academy	1	O
E	Wrestling: Roseville vs. Park CG	1	V
E	Wrestling: TotinoGrace vs. Maple Grove	1	O

YOUTH MEDIA

E	A Bad Day of Monster	1	V
E	Bullying	1	V
E	Cellists of Minnesota	1	V
E	CreaTV episode 5	1	V
E	CTV In Studio:Ryan Evans - White Spider	1	V
E	CTV In-Studio Elizabeth Bishop	1	V
E	CTV Tours Promo (Teen/Youth)	1	V
E	Deadringer Trailer	1	V
E	Disco Dance Party- Cub Scout Pack 419 (Teen/Youth)	1	V
E	East Side Documentary	1	V

E	Ego Death	4	V
E	GGAL	3	V
E	I Made the Earth to Shelter You	1	V
E	Kayode's Skateboard Documentary	1	V
E	Me & I	1	V
E	Military Teen Summit Promo	1	V
E	MN Weather PSA	1	V
E	Neighborhood Game Show	1	V
E	OSFNA 2015	1	V
E	Pack 167 Visits CTV 1:53	1	V
E	Quest for college Recruitment Promo	1	V
E	Retrovirus-Nick Henry	1	V
E	Summer Promo (Teen/Youth)	1	V
E	TCYMN Illuminate! 2015 Showcase Promo (Teen/Youth)	1	V
E	TCYMN Show	12	V
E	The Emperor of Ice Cream	1	V
E	The Normal-ish Cooking Show	1	V
E	The Tuesday Interviews (Youth/Teen)	1	V
E	The Wednesday Interviews (Youth/Teen)	1	V
E	The Worst Short Films Ever Competition 2015	1	V
E	Toothed Mammals vs. Finger Snots	1	V
E	Transition Plus Tour (Teen/Youth)	1	V
E	Troop 53102	1	V
E	Waite House News (Teen/Youth)	1	V
E	YL Promo	1	V

218

Staff Produced 27

Volunteer Produced 152

Outside Produced	39
Education Total	218

P/E/G	Government	Episodes	S/V/O
G	A Tale of the Cities	28	V
G	AH City Tour Video	1	S
G	AH Clean Up Days Promo	1	S
G	AH Fall Clean Up	1	S
G	AH Fall Clean Up Promo	1	S
G	AH Lexington Station Promo	1	S
G	AH State of the City	1	S
G	Candidates Speak Out	5	S
G	Conversation with the Mayor	2	V
G	Election Results 2015	1	S
G	Electronics Recycling Tech Dump FH/LD	1	S
G	Falcon Heights Curtiss Playground Build	1	S
G	Falcon Heights Fire Dept Open House 2015	1	S
G	Falcon Heights Ice Cream Social 2015	1	S
G	FH Winterfest 2015	1	S
G	FH/LD 5K Fun Run 2015	1	S
G	FH/LD Winter Carnival Presentation	1	S
G	FH/LD/SA Sustainability Fair	1	S
G	FH/LD/SA Sustainability Fair 2015 Promo	1	S
G	Fourth of July at Central Park	1	V
G	Lauderdale 50th Anniversary Video Conversations	1	S
G	Lauderdale Citywide Garage Sale	1	S
G	Lauderdale Day in the Park 2015	1	S
G	Lauderdale DIP/RV Puppet Show 2015	1	S
G	Lauderdale Farmers Market	1	S
G	Lauderdale Farmers Market Promo	1	S
G	Lauderdale Halloween Party 2015	1	S
G	LC Arbor Day	1	S

G	LC Button Contest Winner	1	S
G	LC Public Works Facility Dedication	1	S
G	LCCC Mtg	1	S
G	LCFD Booya Sale	1	S
G	LCRA Ice Fishing Tourney	1	S
G	LCRA Ice Skating Party	1	S
G	Little Canada Parade 8-2-2015	1	V
G	Mounds View Bel Rae Opening	1	S
G	Mounds View Car show	1	V
G	Mounds View Community Center Fall Festival 2015	1	S
G	Mounds View Cookies with Santa	1	S
G	Mounds View Fall Family Fun Festival	1	S
G	Mounds View Festival Bike Race	1	S
G	Mounds View Festival in the Park 2015	1	S
G	Mounds View Festival in the Park 5k Promo	3	S
G	Mounds View Festival in the Park Parade 2015	1	V
G	Mounds View National Night Out Promo	1	V
G	Mounds View Today	3	V
G	Music in the Park	2	V
G	MV Citizen of the Year Nominations	1	V
G	MV Cookies with Santa 2015 promo	1	V
G	MV SBM Fire Santa parade	1	S
G	MV Volunteer Coach of the Year Nominations	1	V
G	MVCC Spring Dance Recital	1	S
G	MVCT Crazy for You Promo	1	S
G	NB/MV Rotary Easter Egg Hunt	1	S
G	New Brighton 2015 Stockyard Days Parade LIVE	1	V
G	New Brighton Bridge Construction Video	1	S
G	New Brighton Coronation 2015	1	V

G	New Brighton Now	25	V
G	New Brighton Stockyard Parade 2015	1	V
G	North Oaks Festival & Parade	1	S
G	Radon Safety in Your Home	1	V
G	RamCo Officer Memorial Ceremony 2015	1	S
G	Ramsey County Community Forum 2015	1	S
G	Ramsey County Sheriff's Medicine Drop	1	O
G	Rosefest Parade	1	V
G	Roseville Alzheimer/Dementia Video	1	S
G	Roseville Family Night Out	1	S
G	Roseville Night 2 Unite	1	S
G	Roseville Night to Unite 2015	1	S
G	Roseville Oval Time Lapse	1	S
G	Roseville OVALumination	1	S
G	Roseville Police Dept Behind the Badge #1	1	S
G	Roseville Rosefest Promo :50	1	S
G	Roseville State of the City	1	S
G	Roseville Taste of Rosefest	1	S
G	St. Anthony Candy Cane Hunt	1	S
G	St. Anthony Chamber Holiday Lights Contest	1	S
G	St. Anthony Field Trip Art Fair 2015	1	S
G	St. Anthony Much Ado About Nothing	1	S
G	St. Anthony Silverwood Art Festival 2015	1	S
G	St. Anthony Silverwood Gallery Art Video	1	S
G	St. Anthony Silverwood Park Egg Hunt	1	S
G	St. Anthony VillageFest Parade 7-31-2015	1	V
G	Sustainability Fair LD/FH/SA	1	S
G	Winter Problems for Fire Departments	1	V

Staff Produced	70
Volunteer Produced	75
Outside Produced	1
Government Total	146

**ADDENDUM TO THE
2013 COMMUNITY NEEDS ASCERTAINMENT REPORT**

**NORTH SUBURBAN COMMUNICATIONS COMMISSION
(Arden Hills, Falcon Heights, Lauderdale, Little Canada,
Mounds View, New Brighton, North Oaks, Roseville,
and St. Anthony, Minnesota)**

November 17, 2015

Prepared by

**THE BUSKE GROUP
4808 T STREET
SACRAMENTO, CA 95819
(916) 441-6277**

TABLE OF CONTENTS

Page

I.	INTRODUCTION AND OVERVIEW.....	1
II.	ON-LINE SURVEY.....	2
III.	TELEPHONE SURVEY OF CABLE SUBSCRIBERS	14
IV.	PEG ACCESS EQUIPMENT RECOMMENDATIONS	16
V.	SUMMARY OF FINDINGS	18

APPENDICES

1. 2015 On-Line Survey Questionnaire
 - 1a. Questionnaire Open-Ended Responses: Comments about Comcast
 - 1b. Questionnaire Open-Ended Responses: Comments about CTV North Suburbs
2. 2015 Telephone Survey Report
3. 2015 CTV North Suburbs Video Facility Inventory
4. 2015 Updated CTV North Suburbs Equipment Replacement/Upgrade Packages

ADDENDUM TO THE COMMUNITY NEEDS ASCERTAINMENT

NORTH SUBURBAN COMMUNICATIONS COMMISSION

I. INTRODUCTION AND OVERVIEW

The Buske Group was asked by the North Suburban Communications Commission ("NSCC") -- a nine-city municipal joint powers consortium consisting of the Cities of Arden Hills, Falcon Heights, Lauderdale, Little Canada, Mounds View, New Brighton, North Oaks, Roseville, and St. Anthony, Minnesota (the "NSCC franchise area") -- to prepare this Addendum to the Community Needs Ascertainment report that it submitted to the NSCC on July 15, 2013. The Buske Group was authorized to conduct the following research activities for this Addendum:

- Prepare and conduct an on-line survey to obtain up-to-date information about community needs and interests related to cable TV in the nine cities served by NSCC and CTV North Suburbs.
- Conduct a telephone survey of Comcast cable subscribers in the NSCC franchise area to obtain up-to-date information regarding the company's service packages, customer service, and related matters; PEG Access awareness and viewership; and the importance of local PEG Access programming.
- Prepare updated recommendations regarding the PEG Access equipment packages, taking into consideration the equipment purchases made by CTV North Suburbs since The Buske Group evaluated its inventory and made the recommendations included in the July 15, 2013 Community Needs Ascertainment.

II. ON-LINE SURVEY

The Buske Group prepared an on-line survey questionnaire, based upon the one that was used for the focus group/on-line survey in September-October, 2011. The 2015 on-line survey was conducted from October 5-31. Three hundred ninety-seven (397) people completed the survey, significantly more than the one hundred fifty-five (155) that responded to the 2011 survey.

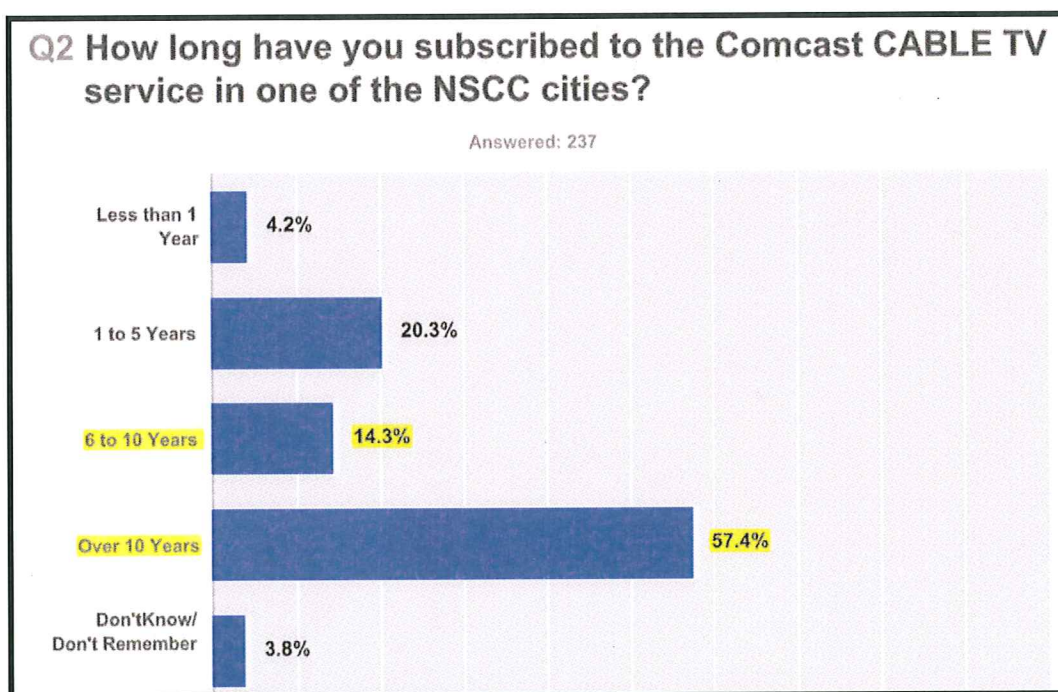
A list of the 36 organizational and institutional affiliations represented by the on-line survey respondents is provided below and on the following page. (Many of them did not indicate an organizational or institutional affiliation, and some of the organizations listed were identified by more than one participant.)

- Abbott Northwestern Hospital
- "Around Town" TV & Around Town Media, LLC
- Arthur's Residential Care
- Autism Works
- Bethel University
- Business - FIC
- City of Falcon Heights
- City of St. Anthony
- Fosston Townhomes
- Gausman & Moore Associates, Inc.
- Hamline University
- Hip Hope
- Kahler
- Kinyon Properties (Rental Twin Homes on Raymond Ave.)
- Mat Talk Online
- Metro State U
- Minnesota Organization on Fetal Alcohol Syndrome
- Minnesota State Horticultural Society
- Mounds View City Council
- Mounds View High School
- Mounds View Schools
- Ms.
- New Brighton City Council
- OneEyedHog

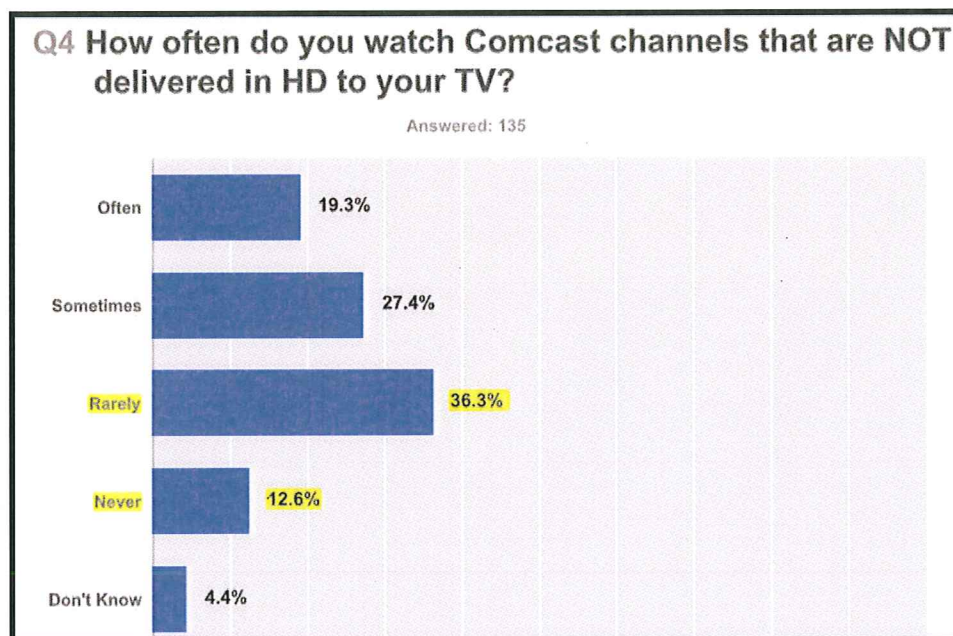
Organizational Affiliations of Focus Group/On-Line Survey Participants (continued)

- RCBC
- Realife of Mounds View
- Roseville Area Schools / 623 Productions
- Roseville Big Band
- Roseville Rotary
- Roseville Schools
- Roseville String Ensemble
- Saltar Solutions
- Small Business Growth Alliance
- St. Jude Medical
- Twin Cities North Chamber of Commerce
- University of Northwestern

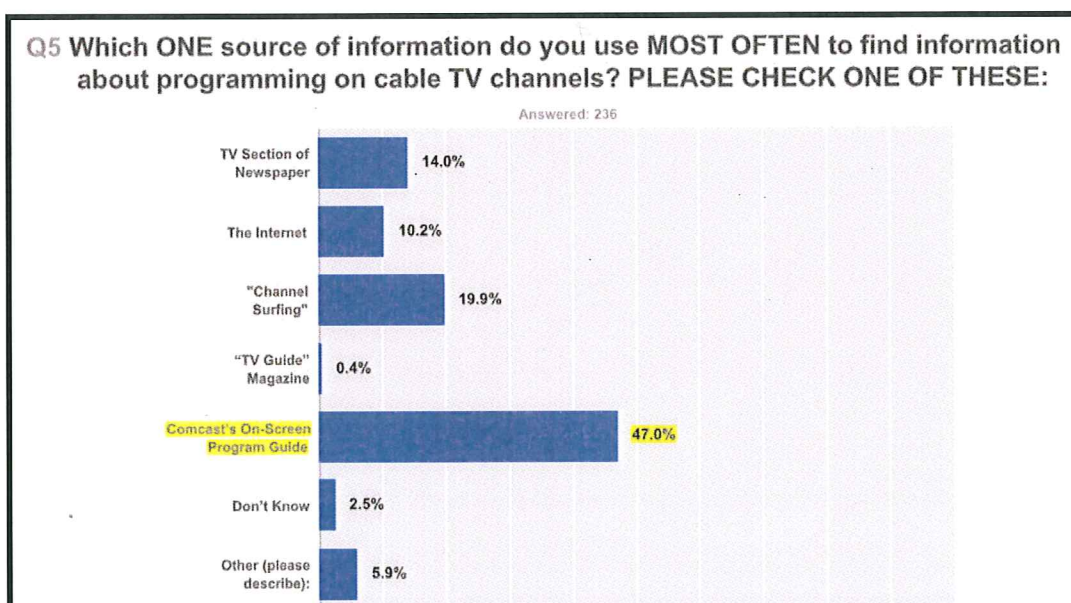
Over half (59.7%) of the online survey respondents said they subscribe to the Comcast cable TV service in one of the NSCC cities. Of these subscribers, 71.7% said they have been Comcast customers for more than five years.



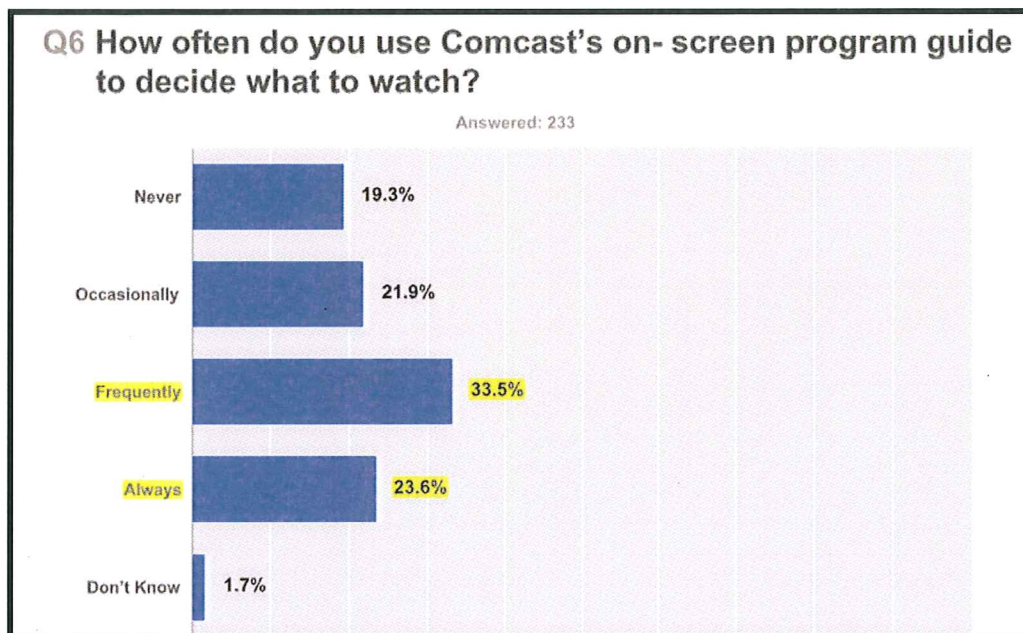
Of the Comcast cable TV subscribers, 56.8% (up from 45% in the 2011 survey) indicated that they pay extra to receive Comcast's high definition ("HD") channels. These HD customers were asked to indicate how often they watch Comcast channels that are not delivered in HD. As illustrated below, nearly half (48.9%) answered "rarely" or "never."



The Comcast subscribers were asked to indicate which one source they used most often to find information about programming on cable TV. The most frequently used source (47%, up from 44.2% in 2011) was Comcast's on-screen program guide, as shown below.



Over half (56.1%, up from 49.4% in 2011) of the Comcast subscribers said they use Comcast's on-screen program guide "frequently" or "always" to decide what to watch.

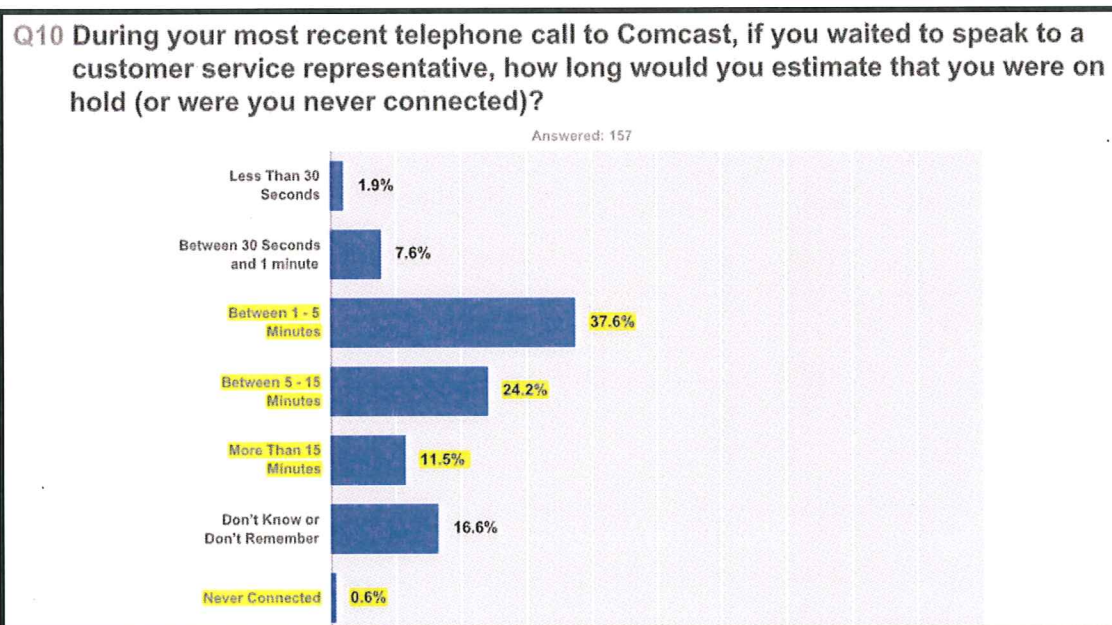


The Comcast subscribers were then asked to indicate their level of satisfaction with Comcast's service in 10 different areas. The chart on the next page displays their responses. The highest-rated items are the *quality of the picture and sound* (rated "Very Good" or "Good" by about 82% of these respondents, up from 79% in 2011) and the *reliability of the Comcast cable TV service* (rated "Very Good" or "Good" by about 68%, a drop from 79% in 2011). The lowest-rated item is the *rates charged by Comcast for cable TV service* (rated "Very Poor" or "Poor" by 63%, up from 52.7% in 2011). Other items for which there were notable increases in the "Very Poor" or "Poor" responses as compared to the 2011 online survey included: *ability to quickly speak to a customer service representative* (37%, up from 15.7% in 2011); *ease of getting services installed or changed by Comcast* (28.6%, up from 13.3% in 2011); and *helpfulness of customer service representatives* (26.2%, up from 18.5% in 2011).

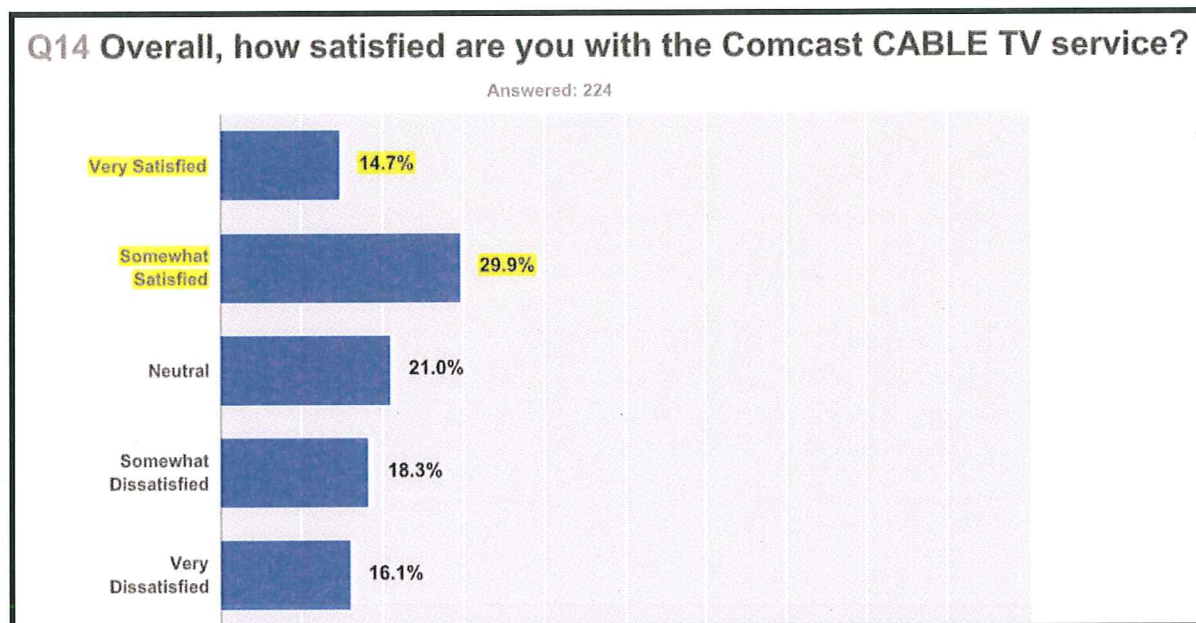
Q7 Please indicate your level of satisfaction with Comcast's CABLE TV service (NOT telephone or Internet service) in the following areas. If you don't know or the item is not applicable ("N/A") to you, just indicate that.

	VERY GOOD	GOOD	FAIR	POOR	VERY POOR	DON'T KNOW	Total
Quality of the picture and sound	34.2% 76	47.7% 106	13.5% 30	0.9% 2	2.3% 5	1.4% 3	222
Reliability of the Comcast cable TV service	24.3% 54	43.2% 96	20.7% 46	7.2% 16	3.2% 7	1.4% 3	222
Number & variety of channels offered	26.5% 59	38.6% 86	22.4% 50	6.7% 15	2.7% 6	3.1% 7	223
The rates charged by Comcast for CABLE TV service	3.7% 8	7.3% 16	24.7% 54	28.8% 63	34.2% 75	1.4% 3	219
Considering how much it costs and the quality of service you receive, the overall value of your cable TV service	4.1% 9	19.4% 43	33.3% 74	25.7% 57	16.7% 37	0.9% 2	222
Ability to quickly speak to a customer service representative when you call Comcast	8.1% 17	21.0% 44	31.0% 65	20.0% 42	17.1% 36	2.9% 6	210
Helpfulness of Comcast's customer service representatives	10.5% 22	29.5% 62	31.0% 65	16.2% 34	10.0% 21	2.9% 6	210
Ease of getting services installed or changed by Comcast	11.2% 22	22.4% 44	30.1% 59	14.3% 28	14.3% 28	7.7% 15	196
Comcast's ability to quickly get problems repaired or resolved	7.3% 15	26.7% 55	29.6% 61	17.5% 36	13.1% 27	5.8% 12	206
Ability of Comcast to respond to a service call within the promised time period	14.7% 28	34.7% 66	26.3% 50	8.4% 16	6.8% 13	8.9% 17	190

Subscribers were asked if they had tried to contact Comcast by telephone during the past year – about 78% said “Yes.” Of those who waited to speak to a customer service representative, 73.9% said they were on hold for one minute or more, or were never connected, as illustrated below.



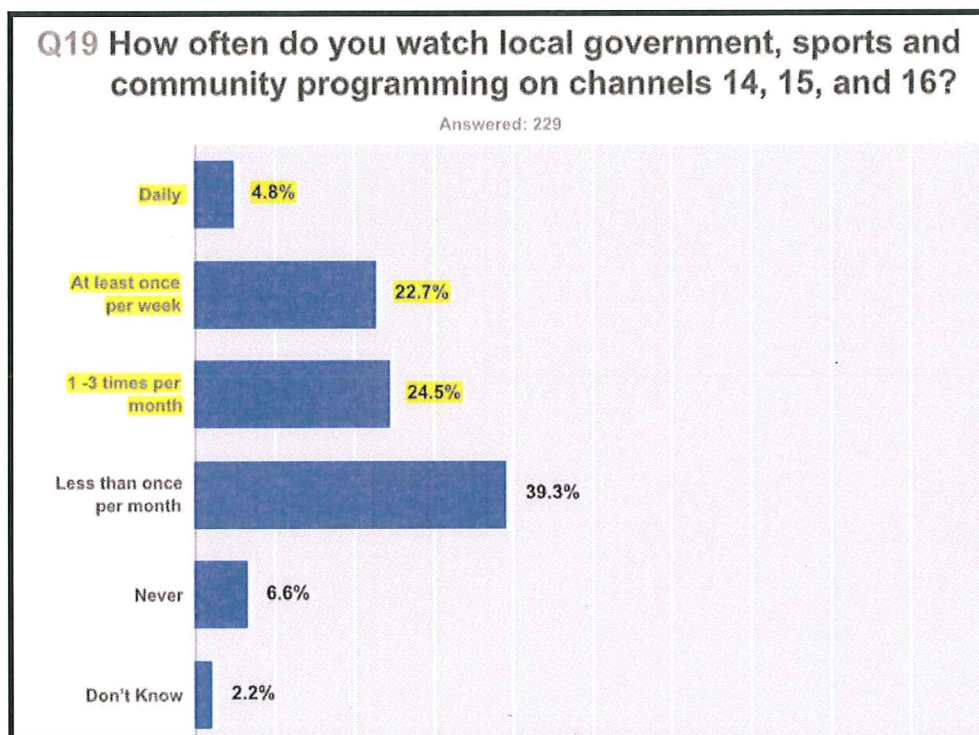
The Comcast subscribers were asked to indicate how satisfied they were with the Comcast cable TV service, overall. As illustrated below, 44.6% (down from 56% in 2011) indicated that they were “Very Satisfied” or “Somewhat Satisfied.”



The respondents could also provide any open-ended comments about the Comcast cable TV service, all of which are provided in Appendix 1a to this Addendum report. Negative comments outnumbered positive/neutral comments by four to one (five to one in 2011). Once again, common criticisms included too high rates and the lack of an a la carte option.

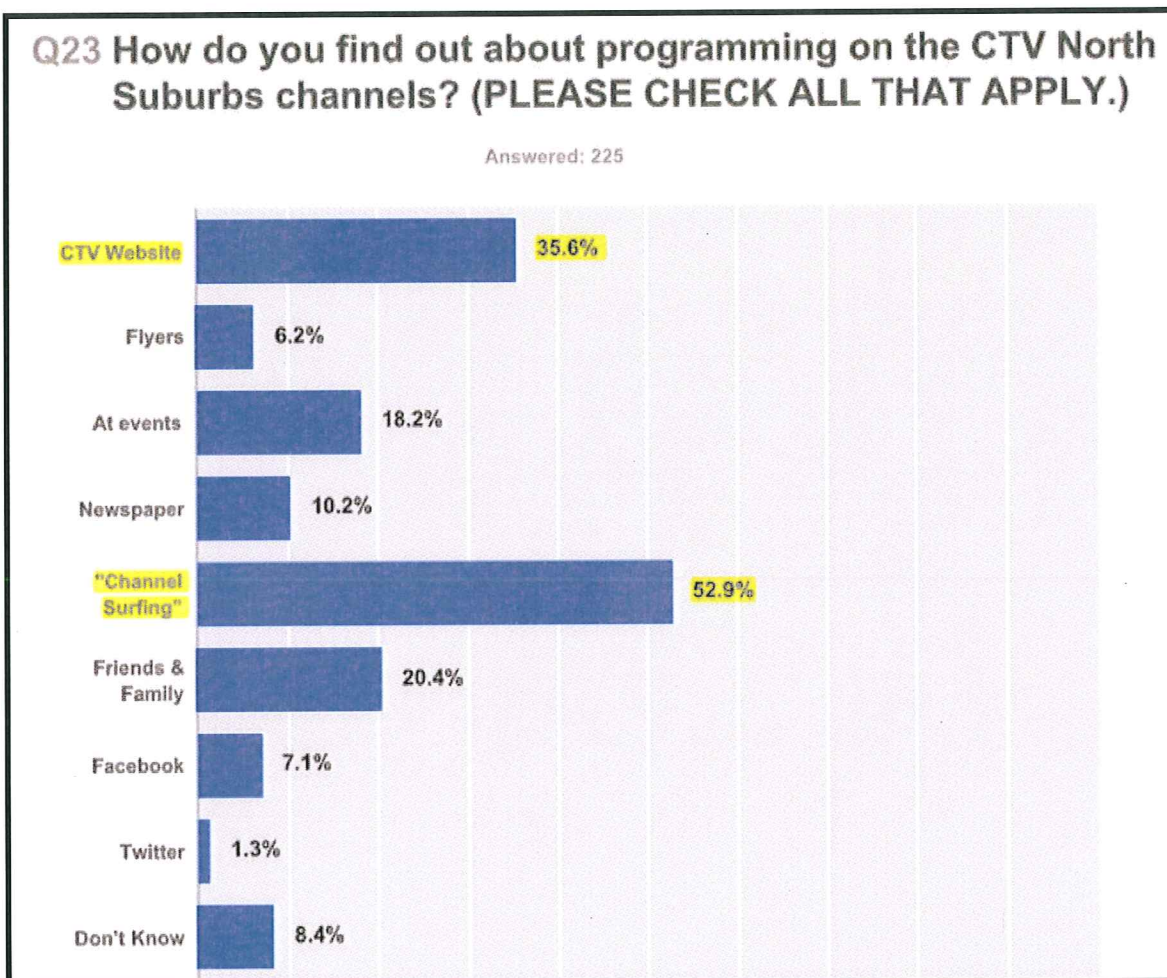
The online survey respondents who do not subscribe (or have never subscribed) to the Comcast cable TV service in the NSCC franchise area were asked to indicate the reasons why they do not subscribe. Of those who previously subscribed, the most frequently indicated reason was “Comcast’s cable TV service is too expensive,” followed by “I can watch programs that are delivered through the Internet” and “Comcast’s customer service was poor.” Of those who had never subscribed to the Comcast cable TV service, the most frequently indicated reasons were “Comcast’s cable TV service is too expensive” and “I can watch programs that are delivered through the Internet,” followed by “I’m not interested – I don’t watch TV enough to make it worthwhile.”

Next, all respondents (including Comcast subscribers and non-subscribers) were asked if they had ever watched programming on one of the channels delivered by CTV North Suburbs (i.e., local sports, community and city programming on channels 14, 15, and 16; local educational programming on channels 18 and 20; local government programming on channel 19; non-local programming on channel 21; and NASA TV on channel 98). 69.5% of them answered that they had watched a CTV North Suburbs channel. Of those who had ever watched a CTV North Suburbs channel, over half (52%) said they watched programming on channels 14, 15 and 16 at least once per month, as illustrated below:



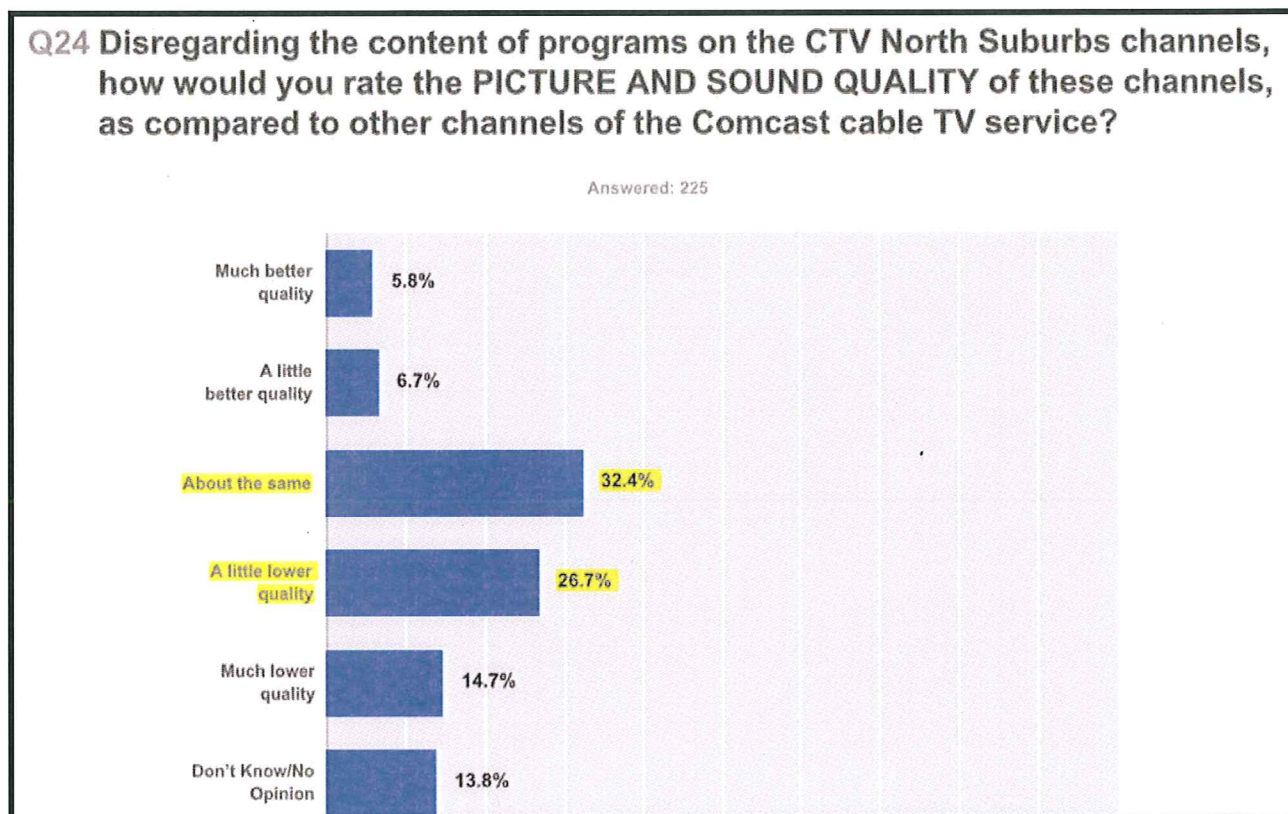
In response to similar questions, 29.5% said they watched programming on channels 18, 19 and 20 at least once per month; 17.9% said they watched programming on channel 21 at least once per month; and 15% said they watched programming on channel 98 at least once per month.

The on-line survey respondents who had watched a channel delivered by CTV North Suburbs were then asked how they found out about the programming on these channels.¹ As illustrated below, the most frequent method was “channel surfing,” followed by the “CTV North Suburbs website.”



¹ NOTE: Prior to September 21, 2015, Comcast did not provide information about the programming shown on any of the channels delivered by CTV North Suburbs on its on-screen program guide, which was indicated as the most frequently used source of cable programming information by the survey/questionnaire respondents.

The respondents who had watched programming on a channel delivered by CTV North Suburbs were then asked, disregarding the content of programs on these channels, to rate the picture and sound quality of these channels, as compared to the other channels of Comcast's cable TV service. As illustrated below, about three-fifths of them answered "about the same" (32.4%) or "a little lower quality" (26.7%).



Respondents who had watched a channel delivered by CTV North Suburbs were provided a list of programs that appear on these channels and were asked to indicate how many times they had watched them. The chart below display their responses, and shows that most often mentioned as being watched at least once per month were: (1) "City Council Meetings" [32.2%], (2) "Local Sports (football, baseball, hockey, etc.)" [31.6%], (3) "Tale of Our Cities" [21.7%], and (4) "North Suburban Beat" [21.1%].

Q25 Please indicate if you have ever watched any of the following programs that are regularly shown on a CTV North Suburbs channel and how regularly you have watched them.

	NEVER	LESS THAN MONTHLY	1-3 TIMES PER MONTH	AT LEAST WEEKLY	DON'T KNOW	Total
City Council Meetings	22.6% 47	44.2% 92	25.5% 53	6.7% 14	1.0% 2	208
Ramsey County Board Meetings	62.0% 116	25.7% 48	9.6% 18	0.5% 1	2.1% 4	187
Tale of Our Cities	52.3% 101	24.9% 48	15.5% 30	6.2% 12	1.0% 2	193
Local Sports (football, baseball, hockey, etc.)	26.5% 52	40.3% 79	17.3% 34	14.3% 28	1.5% 3	196
Disability Viewpoints	69.4% 129	15.1% 28	8.1% 15	3.2% 6	4.3% 8	186
North Suburban Beat	49.7% 97	26.7% 52	14.4% 28	6.7% 13	2.6% 5	195
NET Lifeline Mass	79.2% 145	8.7% 16	6.0% 11	1.6% 3	4.4% 8	183
WWA Talk Show	81.8% 153	5.3% 10	5.9% 11	0.5% 1	6.4% 12	187
Education Conversations (from MN Dept. of Education)	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0.0% 0	0
School Board Meetings	45.5% 90	37.4% 74	13.1% 26	2.0% 4	2.0% 4	198
Democracy Now!	73.9% 139	9.0% 17	11.7% 22	3.2% 6	2.1% 4	188
In The Fight	83.1% 152	5.5% 10	3.8% 7	1.1% 2	6.6% 12	183

Respondents who had watched programming on a channel delivered by CTV North Suburbs were asked to indicate their opinion of four statements about the CTV North Suburbs channels. As illustrated below, 63% to 83% of them “strongly agreed” or “agreed” with each statement.

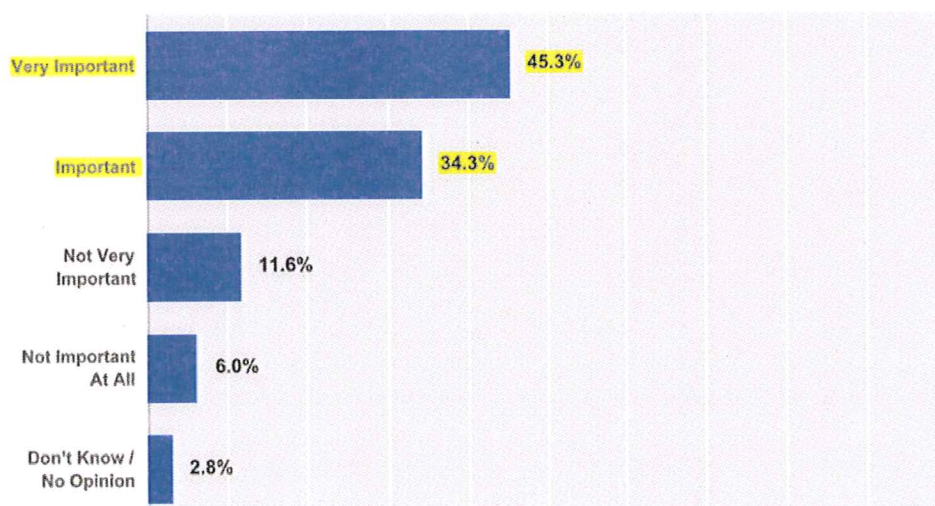
Q26 Please indicate your opinion of the following statements about the CTV North Suburbs channels:

	STRONGLY AGREE	AGREE	NEUTRAL	DISAGREE	STRONGLY DISAGREE	Total
Provides programming that deals with local issues	34.1% 74	49.3% 107	15.2% 33	1.4% 3	0.0% 0	217
Provides programming that publicizes local services	29.5% 64	45.2% 98	22.1% 48	3.2% 7	0.0% 0	217
Provides programming with diverse points of view	25.1% 54	38.1% 82	33.5% 72	3.3% 7	0.0% 0	215
Provides a valuable public service	44.0% 96	36.2% 79	17.0% 37	2.3% 5	0.5% 1	218

Next, all on-line survey respondents (cable subscribers and non-subscribers) were asked how important they think it is to have local cable TV channels that feature programs about local residents, organizations, schools, government, events and issues. As illustrated below, about 80% of them said that these channels are “Very Important” (45.3%) or “Important” (34.3%).

Q27 How important do you think it is to have local cable TV channels that feature programs about local residents, organizations, schools, government, events and issues?

Answered: 318



All on-line survey respondents were then asked if they had ever provided or helped to produce a program to show on a CTV North Suburbs channel, or appeared as a guest on a program shown on a CTV North Suburbs channel. One-third (33.1% -- 120 of the respondents) answered "Yes".

The following series of questions were asked of the 120 respondents who said that they had helped to produce or appeared as a guest on a program to show on a channel delivered by CTV North Suburbs.

- How would you describe the typical condition of the CTV North Suburbs equipment when you have used it?
"Excellent" = 33%; "Good" = 57.7%
- Does the quantity and technical capability of the CTV North Suburbs equipment currently meet your needs?
"Yes" = 84.5%

Finally, all on-line survey respondents were invited to provide any other comments about CTV North Suburbs, all of which are provided in Appendix 1b to this report. Positive/neutral comments outnumbered negative comments by about four to one.

III. TELEPHONE SURVEY OF CABLE SUBSCRIBERS

During the period from October 19-28, 2015, Group W Communications conducted a telephone survey of 400 Comcast cable subscribers in the NSCC franchise area, drawn at random from active residential and cellular telephone numbers. The telephone survey questionnaire was similar to the one used by Group W for the September 21 - October 1, 2011 survey that it conducted. This telephone survey again included questions regarding aspects of Comcast's cable TV service and related matters, as well as awareness and viewership of the CTV North Suburbs channels and the importance of local PEG Access programming. Following are the primary findings of the survey.

The ratings given by the 2015 telephone survey respondents regarding several quality and service measures are very similar to those given to these items by the respondents to the 2011 telephone survey. Almost 90% rated the *reliability of Comcast's cable TV service* and the *quality of the picture and sound* as "good" or "very good." Over 70% of the respondents rated the *number & variety of channels offered* and the *helpfulness of Comcast's customer service representatives* as "good" or "very good." About two-thirds of them rated the *ability of Comcast to respond to a service call within the promised time period* as "good" or "very good." Over half rated the *ability to quickly speak to a customer service representative when you call Comcast*, the *ease of getting services installed or changed by Comcast*, and *Comcast's ability to quickly get problems repaired or resolved* as "good" or "very good." The items that received low ratings were the *rates charged by Comcast for cable TV service*, which was rated as "good" or "very good" by only 14.8% of the respondents (38.6% rated this item as "poor" or "very poor"), and the *overall value of your cable TV service, considering how much it costs and the quality of service you receive*, which was rated as "good" or "very good" by 38.3%.

- Overall, 68.3% of the telephone survey respondents said they are very or somewhat satisfied with their cable TV service (down from 73.1% in the 2011 survey).
- 41% of all cable subscribers (up from 36% in the 2011 telephone survey) pay extra to receive Comcast's high definition channels. This year's survey asked the HD subscribers how often they watch channels that are not delivered in HD. *Nearly half said they rarely (31.1%) or never (15.9%) watch the non-HD channels.*

- 50.5% of all cable subscribers (up from 45.3% in the 2011 telephone survey) say they *most often use Comcast's on-screen guide to find programming information, far more than any other method.*
- Nearly half (47.3%) of all cable subscribers have *watched a program on a CTV North Suburbs channel* (as compared to 49.5% in 2011). Of these viewers:
 - * 52.4% (up from 46% in 2011) said they watched local sports, community and city programming on channels 14, 15 or 16 at least once a month (25.9% said they watch at least once a week).
 - * 23.3% said they watched educational channels 18 or 20 at least once a month (7.9% said they watch at least once a week).
 - * 40.7% said they watched local government programming on channel 19 at least once a month (19% said they watch at least once a week).
 - * 8.5% (up from 5.7% in 2011) said they watched non-local programming on channel 21 at least once a month (3.2% said they watch at least once a week).
 - * 12.2% (up from 12.1% in 2011) said they watched NASA TV on channel 98 at least once a month (3.7% said they watch at least once a week).
 - * 84.7% (down from 86.9% in 2011) have watched City Council meetings (37% said at least monthly);
64.1% (up from 57.1% in 2011) have watched local sports (29.6% said at least monthly);
38.6 (up from 37.9% in 2011) have watched School Board meetings (4.2% said at least monthly); and
37.6% (up from 26.8% in 2011) have watched "North Suburban Beat" (13.8% said at least monthly).
 - * 45% (up from 37% in 2011) say the picture and sound quality on the CTV North Suburbs channels is equal to the picture and sound quality for the other channels of the cable system.
 - * 72.5% (up from 59% in 2011) gave grades of "A" or "B" regarding how well CTV North Suburbs *"provides a valuable community service"* and 61.9% (up from 57.6% in 2011) gave grades of "A" or "B" to *"provides programming that deals with local issues."*
- As was the case in 2011, a very large majority (69.8%) of all telephone survey respondents said it is "important" or "very important" to have local cable TV channels that feature programs about area residents, organizations, schools, government, events and issues.

A complete analysis of the responses to the telephone survey, prepared by Group W Communications and The Buske Group, is included in Appendix 2 to this Addendum report.

IV. PEG ACCESS EQUIPMENT RECOMMENDATIONS

The findings and recommendations regarding the PEG Access equipment packages that were indicated in the 2013 Community Needs Ascertainment report were based upon: (1) our August 2011 inspection of the PEG Access facilities and equipment in the franchise area; and (2) the Video Facility Inventory forms completed by the CTV North Suburbs staff (as updated in April 2013). The 2013 report stated that *“CTV should upgrade much of its field production, editing, studio, master control, and the member cities’ Council Chambers equipment, based upon the observed age, condition, and limited functionality of the equipment. All PEG Access equipment should be able to record and transmit programs in both standard and high definition formats.”* The 2013 report also included a detailed set of equipment packages to address these needs, based upon the equipment inventories at that time.

The Buske Group was asked by the NSCC to prepare updated recommendations regarding the PEG Access equipment packages, taking into consideration the equipment purchases made by CTV North Suburbs and other developments since the 2013 Community Needs Ascertainment report was submitted. The major purchases included: (1) new cameras, tripods, production switcher, replay unit, audio mixer, and internal distribution equipment in one of the two production trucks; (2) new cameras, controllers and mounts for the Roseville City Council Chambers; and (3) new complete audio/video production package for the Little Canada City Council Chambers.

In October 2015, updated Video Facility Inventory forms (Appendix 3 to this Addendum report) were provided to The Buske Group by the CTV North Suburbs staff. After reviewing the updated inventories and having follow-up discussions with staff, we prepared an updated set of equipment replacement/upgrade packages (as shown in Appendix 4). The equipment replacement/upgrade packages in Appendix 4 reflect the impact of: (1) the recent equipment purchases by CTV North Suburbs; (2) the departure of the City of Shoreview from the NSCC (thereby removing the upgrade of an audio/video production package for that City’s council chambers); and (3) input from CTV North Suburbs staff regarding the current needs at the CTV facility and each City Hall location.

The factors described above resulted in an estimated cost for the equipment replacement/upgrade packages of approximately \$10,000,000 over the 10-year franchise term. This estimate is \$2,000,000 less than the amount indicated as the total cost for the equipment replacement/upgrade packages in the 2013 Community Needs Ascertainment report.

As stated in the 2013 Community Needs Ascertainment report, since media equipment is evolving very rapidly, the items identified in Appendix 4 are examples of what could currently satisfy the identified equipment needs, and are not intended to be specific items to be purchased.

V. SUMMARY OF FINDINGS

The tasks conducted by The Buske Group for this Addendum to the 2013 Community Needs Ascertainment report yielded very useful, updated information about community needs and interests in the NSCC franchise area. Responses to both the on-line survey and the telephone survey, each of which were conducted during October 2015, were quite similar to the responses in the 2011 surveys, with a few interesting differences. In addition, while the vast majority of the aging PEG Access facilities and equipment in the franchise area has continued to be used (despite the fact that many items in the updated inventory are now 15-25 years old), much-needed upgrades have occurred for a few of the equipment packages. Therefore, *we believe that the recommendations outlined in the 2013 Community Needs Ascertainment report continue to apply, and in many cases have been strengthened by the findings from the tasks described in this Addendum to that report.*

A. On-Line Survey.

Significantly more people (397) responded to the 2015 on-line survey, as compared to 155 respondents to the 2011 survey. Below are several findings from the 2015 on-line survey:

- Of the 237 respondents who are Comcast cable TV subscribers, 56.8% (up from 45% in the 2011 survey) indicated that they pay extra to receive Comcast's HD channels. Importantly, we learned that *almost half (48.9%) of Comcast's HD subscribers said that they rarely or never watch channels that are not in HD.*
- When all Comcast cable TV subscribers were asked to indicate the one source they used most often to find information about programming on cable TV, *most frequently mentioned was Comcast's on-screen program guide (47%, up from 44.2% in 2011).*
- When the Comcast subscribers were asked to indicate their level of satisfaction with Comcast's service in many areas, several items were ranked significantly lower than they were in the 2011 survey. The highest rated item was the *quality of the picture and sound*, and the lowest-rated item was the *rates charged by Comcast for cable TV service*. These were also the highest and lowest rated items in the 2011 survey.

- Overall, 44.6% of Comcast subscribers (down from 56% in 2011) indicated that they were “very satisfied” or “somewhat satisfied” with Comcast’s cable TV service.
- Of the subscribers who had tried to contact Comcast by telephone during the past year and waited to speak to a customer service representative, 73.9% said they were on hold for one minute or more, or were never connected.
- All on-line survey respondents were invited to provide comments about their Comcast cable TV service. Of the nearly 140 respondents who replied to this invitation, negative comments outnumbered positive/neutral comments by nearly four to one. As in the 2011 survey, common criticisms included too high fees and no a la carte option.
- The online survey respondents who do not subscribe to Comcast’s cable TV service in the NSCC franchise area most frequently indicated that they don’t subscribe because “Comcast’s cable TV service is too expensive”, followed by “I can watch programs that are delivered through the Internet.”
- 69.5% of all online survey respondents indicated that they had watched a CTV North Suburbs channel. Of these respondents:
 - * 52% said they watched programming on channels 14, 15 and 16 at least once per month.
 - * 29.5% said they watched programming on channels 18, 19 and 20 at least once per month.
 - * 17.9% said they watched programming on channel 21 at least once per month.
 - * 15% said they watched programming on channel 98 at least once per month.
 - * The most frequently mentioned method that these respondents said they used to find out about the programming on a CTV North Suburbs channel was “channel surfing” (52.9%), followed by “CTV North Suburbs website” (35.6%).
 - * Disregarding the content of programs, 32.4% said the picture and sound quality of the CTV North Suburbs channels, as compared to the other Comcast channels, was “about the same” and 26.7% said “a little lower quality.”
 - * The most frequently mentioned CTV North Suburbs programs that these respondents said they had watched at least once per month were “City Council Meetings” (32.2%); “Local Sports (football, baseball, hockey, etc.” (31.6%); “Tale of Our Cities (21.7%); and “North Suburban Beat” (21.1%).
 - * Very high percentages said they agreed or strongly agreed that the CTV North Suburbs channels provide programming that deals with local issues (83.4%) and provide a valuable public service (80.2%).

- About 80% of all online survey respondents (cable subscribers and non-subscribers) said it was “very important” (45.3%) or “important” (34.3%) to have local cable TV channels that feature programs about local residents, organizations, schools, government, events and issues.
- All on-line survey respondents were invited to provide comments about CTV North Suburbs. From the nearly 110 respondents who replied to this invitation, positive/neutral comments outnumbered negative comments by about four to one.

B. Telephone Survey of Cable Subscribers.

The 2015 telephone survey obtained the responses of 400 Comcast cable subscribers in the NSCC franchise area, drawn at random from active residential and cellular telephone numbers. Below are several findings from the 2015 telephone survey:

- Ratings given by the 2015 telephone survey respondents regarding several quality and service measures were very similar to those given to these items by the respondents to the 2011 telephone survey.
 - * Almost 90% rated the *reliability of Comcast’s cable TV service* and the *quality of the picture and sound* as “good” or “very good.”
 - * Over 70% of the respondents rated the *number & variety of channels offered* and the *helpfulness of Comcast’s customer service representatives* as “good” or “very good.”
 - * About two-thirds of them rated the *ability of Comcast to respond to a service call within the promised time period* as “good” or “very good.”
 - * Over half rated the *ability to quickly speak to a customer service representative when you call Comcast*, the *ease of getting services installed or changed by Comcast*, and *Comcast’s ability to quickly get problems repaired or resolved* as “good” or “very good.”
 - * Low ratings were given to the *rates charged by Comcast for cable TV service* (rated “good” or “very good” by only 14.8% of the respondents -- 38.6% rated this “poor” or “very poor”), and the *overall value of your cable TV service, considering how much it costs and the quality of service you receive* (rated “good” or “very good” by 38.3% of the respondents).
 - * Overall, 68.3% of the telephone survey respondents said they are very or somewhat satisfied with their cable TV service (down from 73.1% in 2011).
- 41% of all cable subscribers (up from 36% in the 2011 telephone survey) pay extra to receive Comcast's high definition channels. *Nearly half said they rarely (31.1%) or never (15.9%) watch the non-HD channels.*

- 50.5% of all cable subscribers (up from 45.3% in the 2011 telephone survey) say they *most often use Comcast's on-screen guide to find programming information, far more than any other method.*
- Nearly half (47.3%) of all cable subscribers have *watched a program on a CTV North Suburbs channel* (as compared to 49.5% in 2011). Of these viewers:
 - * 52.4% (up from 46% in 2011) said they watched local sports, community and city programming on channels 14, 15 or 16 at least once a month (25.9% said they watch at least once a week).
 - * 23.3% said they watched educational channels 18 or 20 at least once a month (7.9% said they watch at least once a week).
 - * 40.7% said they watched local government programming on channel 19 at least once a month (19% said they watch at least once a week).
 - * 8.5% (up from 5.7% in 2011) said they watched non-local programming on channel 21 at least once a month (3.2% said they watch at least once a week).
 - * 12.2% (up from 12.1% in 2011) said they watched NASA TV on channel 98 at least once a month (3.7% said they watch at least once a week).
 - * 84.7% (down from 86.9% in 2011) have watched City Council meetings (37% said at least monthly);
64.1% (up from 57.1% in 2011) have watched local sports (29.6% said at least monthly);
38.6 (up from 37.9% in 2011) have watched School Board meetings (4.2% said at least monthly); and
37.6% (up from 26.8% in 2011) have watched "North Suburban Beat" (13.8% said at least monthly).
 - * 45% (up from 37% in 2011) say the picture and sound quality on the CTV North Suburbs channels is equal to the picture and sound quality for the other channels of the cable system.
 - * 72.5% (up from 59% in 2011) gave grades of "A" or "B" regarding how well CTV North Suburbs *"provides a valuable community service"* and 61.9% (up from 57.6% in 2011) gave grades of "A" or "B" to *"provides programming that deals with local issues."*
- As was the case in 2011, a very large majority (69.8%) of all telephone survey respondents said it is "important" or "very important" to have local cable TV channels that feature programs about area residents, organizations, schools, government, events and issues.

C. PEG Access Equipment Recommendations.

Since the 2013 Community Needs Ascertainment report was submitted by The Buske Group, significant equipment purchases by CTV North Suburbs and other developments occurred. Major purchases included: (1) new cameras, tripods, production switcher, replay unit, audio mixer, and internal distribution equipment in one of the two production trucks; (2) new cameras, controllers and mounts for the Roseville City Council Chambers; and (3) new complete audio/video production package for the Little Canada City Council Chambers.

After reviewing the updated equipment inventories prepared by the CTV North Suburbs staff, and having follow-up conversations with them, an updated set of equipment replacement/upgrade packages was prepared (see Appendix 4). The equipment replacement/upgrade packages reflect the impact of: (1) the recent equipment purchases by CTV North Suburbs; (2) the departure of the City of Shoreview from the NSCC (thereby removing the upgrade of an audio/video production package for that City's council chambers); and (3) input from CTV North Suburbs staff regarding the current needs at the CTV facility and each City Hall location. These factors resulted in an estimated cost for the equipment replacement/upgrade packages of approximately \$10,000,000 over the 10-year franchise term. This estimate is \$2,000,000 less than the amount indicated as the total cost for the equipment replacement/upgrade packages in the 2013 Community Needs Ascertainment report.

The Morris Leatherman Company

CTV North Suburbs

2015 Cable Subscriber Survey

Findings and Implications

Findings:

1. Currently, 40% of the subscribers in the CTV North Suburbs communities subscribe to only Comcast cable television service. Sixty percent take a bundle of services.
2. The typical cable television household subscribed for 6.9 years. Eighteen percent subscribed during the past two years, while 11% subscribed over 15 years ago. Eighty-five percent rate their cable television service as "excellent" or "good;" sixteen percent see it as "only fair" or "poor." When considering the monthly charge and quality of cable television service they receive, 80% think the general value is "excellent" or "good." Twenty-one percent, however, think the value is "only fair" or "poor."
3. Fifty percent of the subscribers had contact with the cable company either in person or by telephone during the past year. The typical subscriber waited on hold for 7½ minutes to reach a customer service representative. Seventy-seven percent rate the level of service they received as "excellent" or "good;" twenty-three percent see it as "only fair" or "poor." Critical respondents point to a "long wait on hold" and "didn't fix the problem" each at 24%, "rude," at 13%, and "hung up on or disconnected" at 9%. Twenty-five percent also report they have experienced technical problems either "frequently" or "occasionally."
4. Viewing of local government and sports Channel 14 varies with the type of programming. The table below summarizes the percentage of households tuning in during the past year:

<i>Programming</i>	<i>Viewership</i>
Your City Council meeting	25%
High School Sports	18%
Ramsey County Board meetings	17%
Other City Council meetings	9%
Roseville Skating Center events	5%
North Star Girls Roller Derby	3%

Overall, 43% of cable television subscribers report watching Channel 14 either “frequently” or “occasionally.”

5. Similarly, viewing of local programming on Channel 15 varies with the type of programming. The table below summarizes the percentage of households tuning in during the past year:

<i>Programming</i>	<i>Viewership</i>
City parades and festivals	22%
High School concerts	15%
CTV Election coverage	13%
City concerts	12%
Shoreview Northern Lights Variety Band Christmas concert	12%
High School graduations	11%
WWA Talk Show	10%
A Tale of Our Cities	9%
Roseville Strings Concert	8%
North Suburban Beat	7%
Disability Viewpoints	7%
UFO’s and the Paranormal	7%
High School Robotics Competition	4%

Not very different from the result in the case of Channel 14, 42% of cable television subscribers report watching Channel 25 at least “occasionally.”

6. Finally, viewing of non-local programming on Channel 21 varies with the type of programming. The table below summarizes the percentage of households tuning in during the past year:

<i>Programming</i>	<i>Viewership</i>
Saint Paul Saints’ games	21%
Classic arts	11%
Democracy Now	9%

Thirty percent of cable television subscribers report watching Channel 21 either “frequently” or “occasionally.”

5. Forty-nine percent of cable subscribers think local city, school district and public access channel are “very important” or “somewhat important.” Fifty percent do not share this perspective.

6. Sixty-two percent report using Comcast's on-screen guide to find information about programming on cable television channels. Fifteen percent find the information through "channel surfing." Only eight percent use the "television section in the newspaper," while six percent use "TV Guide magazine."

7. Forty-six percent "almost always" watch cable television programming in high definition. An additional 39% watch in high definition either "frequently" or "occasionally." Only fifteen percent report they watch in high definition either "rarely" or "never."

Subscriber Demographics:

The chart below shows the demographic characteristics of two groups – the population of cable subscribers and viewers of CTV North Suburbs programming – for comparison. The first column lists the demographic group, the second column shows the percentage of that group within the entire sample, and the third column indicates the percentage of that group within the sub-sample of viewers:

<i>Demographic Characteristic</i>	<i>Sample</i>	<i>Viewers</i>
Seniors in household	26%	27%
School-aged children and pre-schoolers in household	35%	37%
Home owners	69%	77%
Home renters	31%	23%
18-34 years old	19%	12%
35-44 years old	23%	24%
45-54 years old	20%	21%
55-64 years old	18%	23%
65 and over	21%	22%
High school or less education	27%	28%
Post-secondary experience	32%	34%
College graduate	42%	38%
Under \$35,000 yearly household income	12%	11%
\$35,000-\$50,000 yearly household income	35%	24%
\$50,000-\$75,000 yearly household income	33%	37%
Over \$75,000 yearly household income	19%	19%
Male	48%	51%
Female	52%	49%
Arden Hills residents	6%	7%
Falcon Heights residents	5%	5%
Lauderdale residents	2%	3%
Little Canada	10%	10%

<i>Demographic Characteristic</i>	<i>Sample</i>	<i>Viewers</i>
Mounds View residents	9%	10%
New Brighton residents	20%	17%
North Oaks residents	5%	4%
Roseville residents	34%	36%
Saint Anthony residents	9%	8%

In general, viewers are a general reflection of the cable subscriber population. This is unusual because most Metropolitan Area cable systems show significant deviations in age, household composition, or education level.

Conclusions:

A. CTV North Suburbs' broad spectrum of programming over the three cable channels reaches an impressive 61% of subscribers. Nine percent would be considered "frequent" viewers, while 52% are "occasional" viewers. This is above the norm of 52% in the Twin Cities suburban area.

B. Forty-three percent of the cable subscribers at least "occasionally" turn to Channel 14, while another 42% watch Channel 15 on at least an "occasional" basis. Channel 21 draws a somewhat lower 30% of the city's households. In the first two cases, viewership is higher than the suburban norm of 34%.

C. Subscribers are split on the importance of local city, school district and public access channels. Forty-nine percent consider them either "very important" or "somewhat important," while 50% think they are "not too important" or "not at all important." However among the 61% viewers of CTV North Suburbs programming, 62% indicate they are important with only 38% considering them of less importance.

D. Comcast's On-Screen Guide is the most important source of information for a very high 62% of subscribers. Local programming needs a presence on this guide to broaden viewership in the future.

E. Two-thirds of subscribers currently watch cable television programming in high definition, while only 15% indicate they "rarely" or "never" watch. Any efforts to provide local programming in high definition should be strongly considered as the expectation for this option continues to grow in the coming years.

F. Customer ratings of the level of service prove to be lower than the norm. The threshold for high quality customer service in the public sector is 80% satisfaction; the cable company's satisfaction rating is 77%. Complaints center on two areas: "the problem wasn't fixed" and "long waiting time on hold." Both of these areas should be improved.

Methodology:

This study contains the results of a survey administered to 400 randomly selected of CTV North Suburbs cable subscribers. Professional interviewers conducted the survey by telephone between August 24th and September 2nd, 2015. The typical respondent took 11 minutes to complete the questionnaire. The results of the study are projectable to all CTV North Suburbs cable subscribers within $\pm 5.0\%$ in 95 out of 100 cases.